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## ***Public Folder HelpDesk V11 – User Manual***

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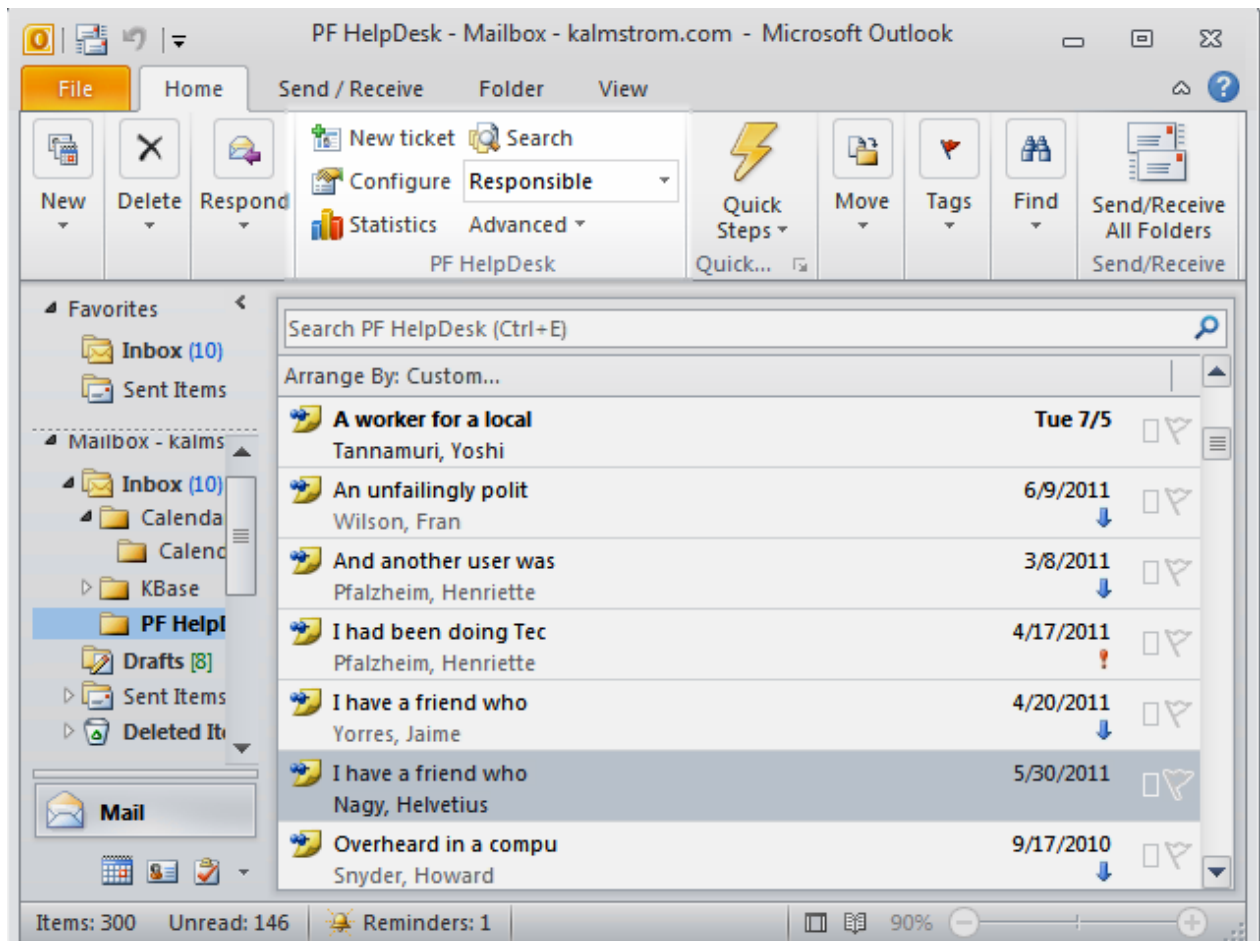
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## 1 INTRODUCTION

In *Public Folder HelpDesk* – or *PF HelpDesk* – support cases or other issues that need to be tracked are formalized in tickets, which are filled out automatically or by the people working at the helpdesk. The tickets are easily distributed among the staff, confirmations are sent out automatically and when a case is closed the ticket can be saved in a knowledge base. The information in the tickets also is automatically saved into a database where it can be searched and used in the integrated Statistics tool. *PF HelpDesk* is totally integrated in Outlook.



In Outlook 2003, which has no ribbon, most buttons are placed in a toolbar to the right of the ticket list, refer to The *PF HelpDesk* Outlook buttons.

In this manual we have chosen to take support cases as examples, but *PF HelpDesk* can be used for all other issue tracking purposes as well.

When we talk about **clients** in this manual we mean the people who are handling the tickets, for example members of a support team, or the machines used by them.

The screenshots in this manual come from either Office 2010 or 2007. In some cases, when the layout differs significantly, we also show screenshots from Outlook 2003.



In this manual we talk about e-mail conversion, but tickets may also be created from Outlook **Tasks** or **Appointments** by using the *PF HelpDesk* conversion button.



You are welcome to print this manual or parts of it and use it within your organization. You may also change or add text or images so that the manual better suits your needs. To make this easy we have opted to offer it in .DOC format as well as in .PDF.

Section 4 and 5 are of use for all staff working with *PF HelpDesk*, while the rest of the manual mainly is intended for the administrator/management.

## 2 REQUIREMENTS

To install and use *PF HelpDesk* you need

- Microsoft Outlook 2003 and above installed on each client. It is here the most of the work takes place.
- An Exchange server, any version, for sharing and storage.
- Microsoft Excel 2000 and above for the statistics tool.
- Windows 2000, XP, Vista or 7

For installation in a shared mailbox you need to allow scripts in shared folders, refer to Installation of *PF HelpDesk* in a Shared Mailbox.

For installation in a public folder in Outlook 2010 you need to allow scripts in public folders, refer to Central Installation. For lower versions of Outlook scripts are allowed by default.

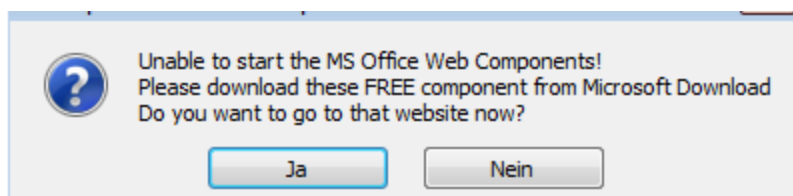
The application helps you get more out of Outlook and Exchange, but it does not assist you with the general configuring of those programs.

### 2.1 OFFICE WEB COMPONENTS

If you use *PF HelpDesk* with Office 2007 and 2010 you need to have **Office Web Components** installed for:

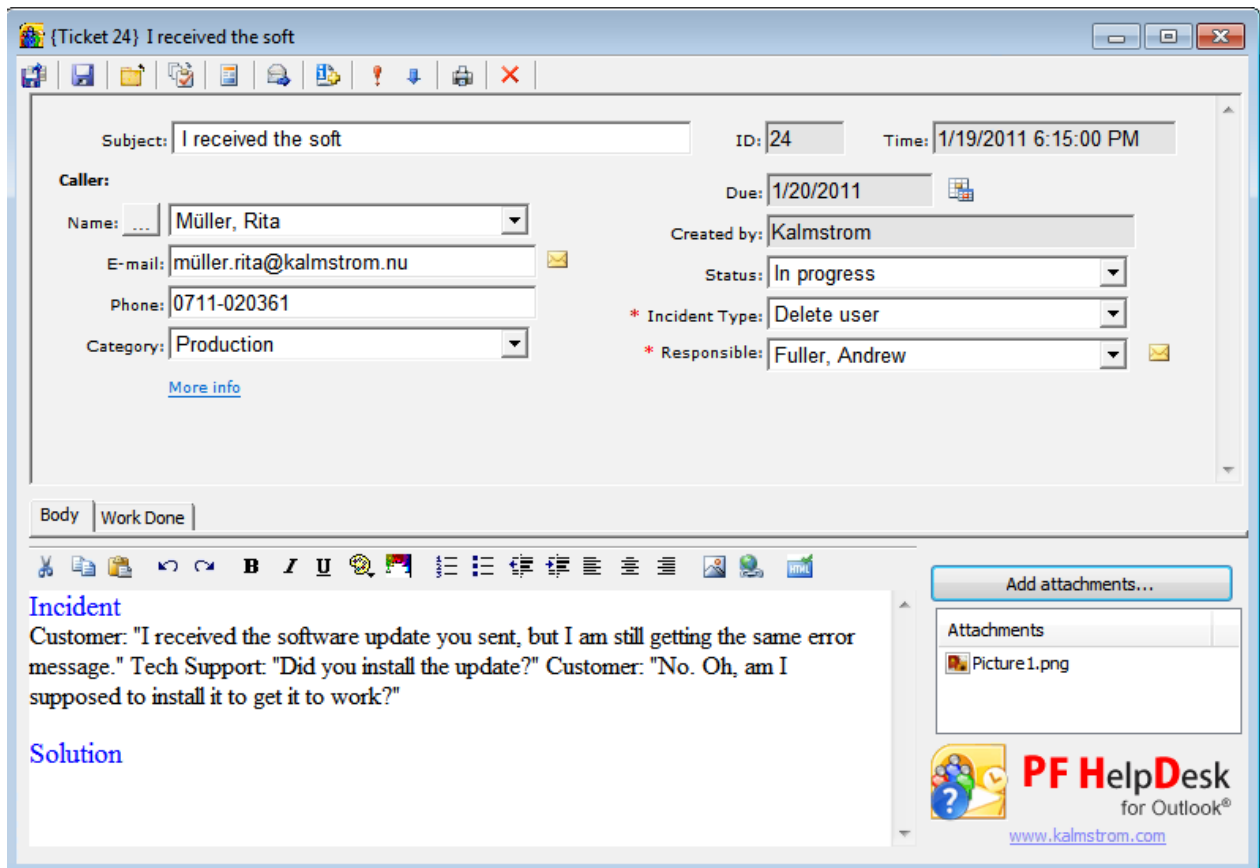
- *PF HelpDesk* Settings
- Statistics
- Search of closed tickets

Office Web Components are not installed by default with Office 2007 and 2010, but the Web Components for Office 2003 works fine for 2007 and 2010 also. If you don't have them installed you will be prompted to download them if you try to run one of the four features listed above.



### 3 THE TICKET

The *PF HelpDesk* tickets are ordinary Outlook post items that you may customize to suit your organization's needs. Here below the default ticket is described. For customizations, *refer to* Customize the Ticket HTML Form.



The screenshot shows a Microsoft Outlook window titled "{Ticket 24} I received the soft". The form contains the following fields:

- Subject:** I received the soft
- ID:** 24
- Time:** 1/19/2011 6:15:00 PM
- Caller:**
  - Name:** Müller, Rita
  - E-mail:** müller.rita@kalmstrom.nu
  - Phone:** 0711-020361
  - Category:** Production
- Due:** 1/20/2011
- Created by:** Kalmstrom
- Status:** In progress
- \* Incident Type:** Delete user
- \* Responsible:** Fuller, Andrew

Below the fields is a "More info" link. The form is divided into two tabs: "Body" and "Work Done". The "Body" tab is active, showing the incident description:

**Incident**  
Customer: "I received the software update you sent, but I am still getting the same error message." Tech Support: "Did you install the update?" Customer: "No. Oh, am I supposed to install it to get it to work?"

**Solution**

On the right side of the form, there is an "Add attachments..." button and a list of attachments, currently showing "Picture1.png". At the bottom right, there is a logo for "PF HelpDesk for Outlook®" and the website "www.kalmstrom.com".

#### 3.1 MANDATORY FIELDS

Only a few fields are mandatory in the *PF HelpDesk* ticket. These fields are marked with a red star (\*). Tickets can be saved with some of the mandatory fields empty, but tickets cannot be closed until all mandatory fields are filled out.

#### 3.2 PARTS

The *PF HelpDesk* ticket form is divided into three parts, the **Toolbar Strip**, the **HTML Form** and the **Tab Strip**.

##### 3.2.1 Toolbar Strip

The **Toolbar Strip** contains buttons for different options: Save the ticket, Close the ticket, Export ticket data to an Outlook Task, Insert a FAQ Reply, Forward the ticket, Add ticket data to a *KBase* article and Delete the ticket.

Click **Save and Close Window** if you wish to save the ticket changes and then close the ticket window.



Click **Save** if you wish to save the ticket changes and then continue working with the ticket.

Click **Close** when the support case is finished. The ticket is then closed and will be removed from Outlook. Refer to Open and closed tickets.



Click **Task** to create an Outlook Task, which is saved among your personal tasks. The newly created task can be used for **synchronizing** with a phone or PDA.

Click **FAQ Reply** if you want to insert a standard answer in the ticket. For more information, *refer to* FAQ.

Click **Forward** if you want to forward the ticket to another person.

Click **Add to KB** to create an article in the knowledge base from a ticket that will be closed. It is then added to **KBase**, the kalmstrom.com knowledge base that runs inside Outlook. For more information, *refer to* KBase.

Click **High or Low Importance** to add the normal Outlook Importance icons to the ticket. The default status is Normal.

Click the **Print** button to print the ticket.

Click the **X** button to **delete** the ticket from both Outlook and the database.

### 3.2.2 HTML Form

In the **HTML Form** you can set different ticket properties. You may add your own fields to the HTML Form, *refer to* Customize the Ticket HTML Form. This is the default form:

|                                                                                                                                   |  |                                                                                                                                        |                            |
|-----------------------------------------------------------------------------------------------------------------------------------|--|----------------------------------------------------------------------------------------------------------------------------------------|----------------------------|
| Subject: All right...now dou                                                                                                      |  | ID: 254                                                                                                                                | Time: 2/13/2010 3:45:00 PM |
| <b>Caller:</b><br>Name: Pavarotti, Jose<br>E-mail: pavarotti.jose@kalmstrom.nu<br>Phone: (208) 555-8097<br>Category: Distribution |  | Due: 2/14/2010<br>Created by: Leverling, Janet<br>Status: Suspended<br>* Incident Type: Delete user<br>* Responsible: Leverling, Janet |                            |
| <a href="#">More info</a>                                                                                                         |  |                                                                                                                                        |                            |

Ticket **ID**, Creation **Time** and **Created by** are set automatically and cannot be changed.

**Caller Category**, **Status**, **Incident Type** and **Responsible** are easily chosen from drop lists. You can also select "New entry" and create a new entry. In the Settings, Ticket form settings, the administrator can select how these new entries should be handled: create new objects, ask or do nothing.

It is not possible to close a ticket if one of these values is non-existent in the database.

If a default Responsible is set for the caller, the name is automatically filled out when the caller is selected. If no default Responsible is set, the Responsible person is selected manually from the drop list. *Refer to the Settings, Caller tab.*

For **Due Date**, click the icon and pick the date.

The **Caller Name** may be picked from the **Global Address List** or Outlook **Contacts**, and it may also be chosen in the dropdown from the **Callers list** in the *PF HelpDesk* Settings. The other details about that caller are then filled out automatically. When you convert an e-mail to a ticket some of these fields are filled out automatically with details from the e-mail.

When a new caller is entered in the caller's field, the information about this caller can be automatically saved to the database and show up in the Settings under the Caller tab, *refer to Ticket form settings.*

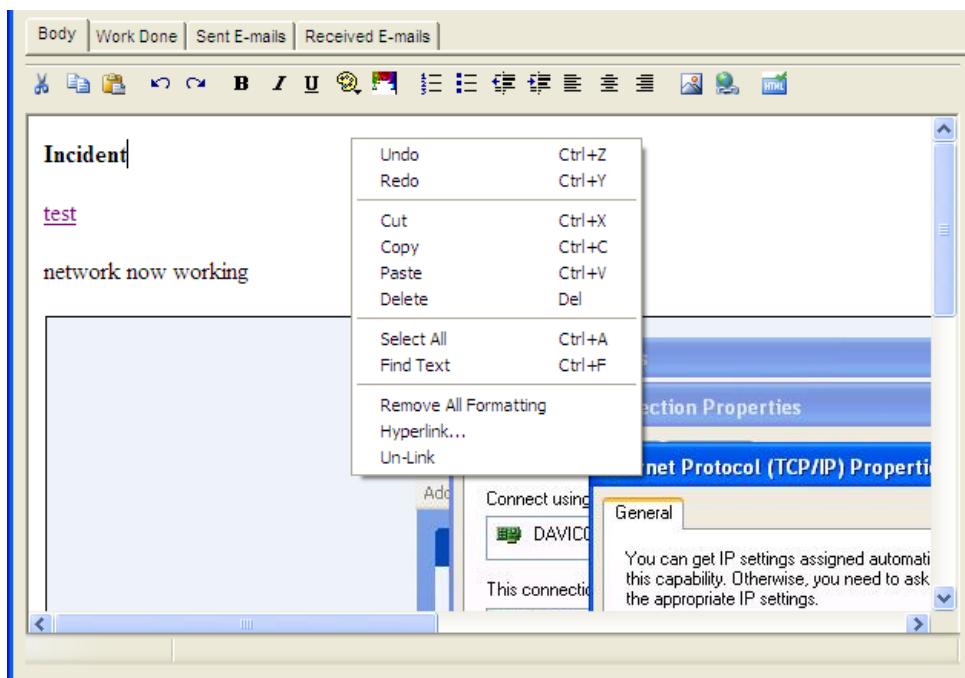
**E-mails to Caller and Responsible** informing them of the ticket can be sent by clicking the e-mail symbol. *Refer to Manual e-mail to the caller and Manual e-mail to the responsible.* These e-mails may also be sent automatically, *refer to Templates.*

### 3.2.3 Tab Strip



In the **Tab Strip** you may find different options like Body, Work Done and maybe also Sent and Received Emails.

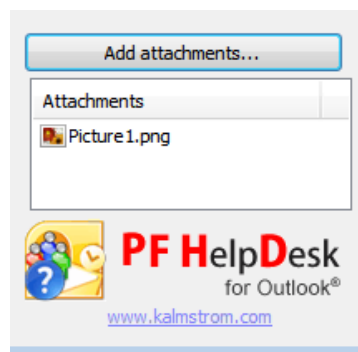
#### 3.2.3.1 Body Tab





Under the **Body Tab** you will find the body of the ticket in an HTML editor. If you convert an e-mail to a ticket, the body of the e-mail will be placed here. You may edit it or add text, and if you right click the HTML editor, a context menu will be shown.

In the Attachments List you can open, save as and remove attachments by right clicking them. You may also add new attachments with the "Add Attachment..." button.



### 3.2.3.2 Work Done Tab

| Description  | Date      | Time | Name   |
|--------------|-----------|------|--------|
| Example Work | 4/12/2010 | 30   | Jayant |

Under the *Work Done Tab*, click the + sign to enter a work description and a time. This is especially useful if several people work with a case, or if you work with it on several occasions.

If Minutes worked is not filled out, the standard time stated by the administrator in the Settings is suggested automatically when the user clicks Close to close the case.

### 3.2.3.3 Sent E-mails and Received E-mails Tabs

The **Sent and Received Emails Tabs** will be visible if the administrator has checked the option "Save e- mails in Subfolders". Here you can view all sent and received e-mails for the selected ticket and open them by double clicking.

| From                    | Subject          | Received         |
|-------------------------|------------------|------------------|
| ticketadmin@irctc.co.in | Email From IRCTC | 4/6/2010 2:53... |
| Jayant Rimza            | Ticket           | 4/6/2010 5:22... |

### 3.3 OPEN AND CLOSED TICKETS

**Open tickets** are *PF HelpDesk* tickets that concerns **cases which are not finished yet**. They are stored both in the database and in the Outlook folder.

Click the **Close** button in the Toolbar strip when the support case is finished. The ticket is then closed and will be removed from Outlook. It is **still saved in the database** and easily accessed by **Search** and **Reopen**.

In the **database** table tblTickets, field blnClosed, the open tickets are marked "0" and the closed tickets "1" or "-1".

In the *Closed* field of the **statistics tool** you can choose to see data from all tickets, or from only closed or only open tickets. False = not closed (= Open). True = Closed.

#### 3.3.1 Automatic reopening

If a caller replies to a ticket e-mail and the ticket already has been closed, *PF HelpDesk* automatically opens the ticket again. Only if the former ticket has been deleted from the database, a new ticket is created.

For the ticket to be reopened the caller should reply to a ticket e-mail which contains a **ticket ID** in the subject. Callers receive such e-mails on manual replies from ticket form (by clicking the e-mail symbol), *refer to* Manual e-mail to the caller. These notification e-mails may be also sent automatically, *refer to* Templates. The ticket will be reopened either the reply is converted into a ticket manually or automatically.

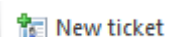
The screenshot shows a web form for a ticket titled '{Ticket 39} subject 7'. The form includes fields for Subject (subject 7), ID (39), Time (10/21/2010 12:10:00 PM), Caller Name (Caller Name 3), E-mail (test@kalmstrom.net), Phone, Category, Due date (10/21/2010), Created by (Administrator), Status, Ticket Type, and Responsible. A 'Send an e-mail' button is highlighted with a mouse cursor.

## 4 HOW PF HELPDESK SIMPLIFIES THE SUPPORT STAFF'S WORKFLOW

There are basically three scenarios for helpdesk personnel: they receive their cases by telephone, by e-mail or via a web form. E-mails and messages from the web form can also be converted into tickets automatically.

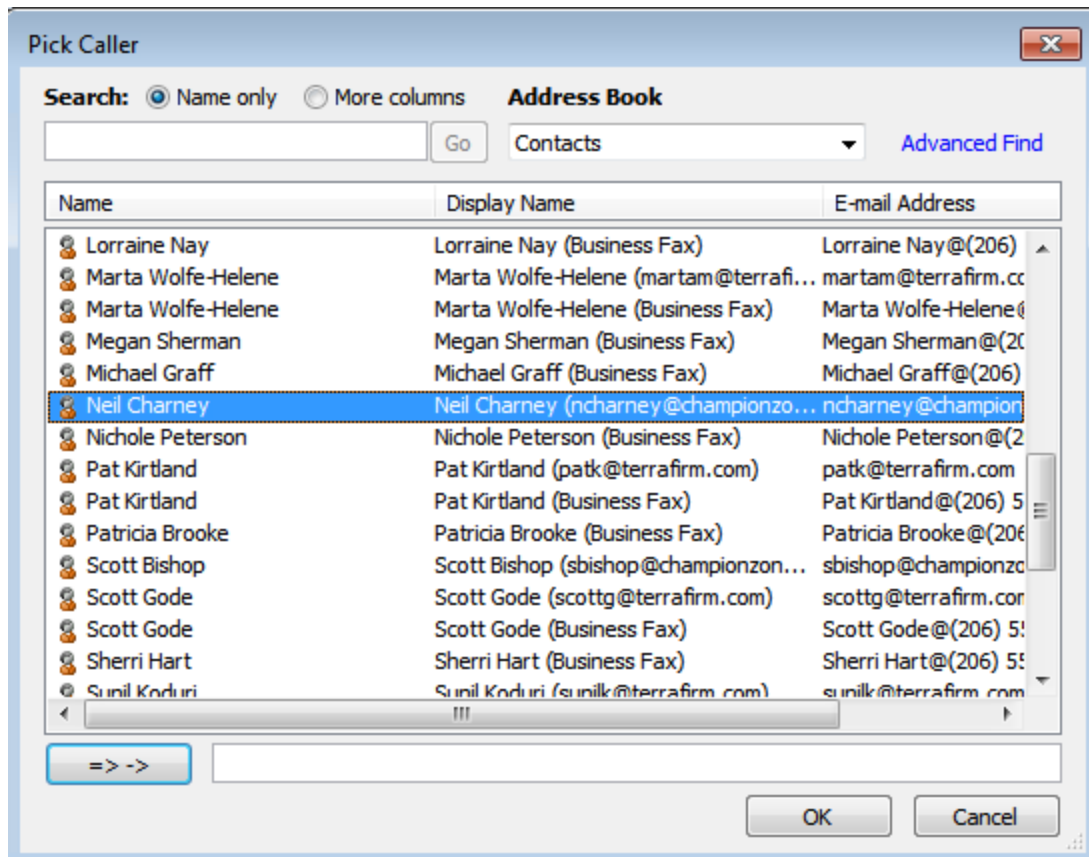
### 4.1 TELEPHONE CALL

When answering the phone, the support person opens a new ticket by clicking the **New** button in the *PF HelpDesk* toolbar.



The **Caller** can be added in several different ways:

1. Picked from the **Global Address List** or from Outlook **Contacts**.



**Pick Caller**

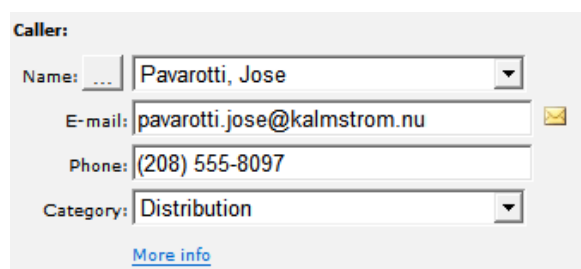
Search: ☒ Name only ☐ More columns **Address Book**

Go **Contacts** [Advanced Find](#)

| Name                | Display Name                                | E-mail Address           |
|---------------------|---------------------------------------------|--------------------------|
| Lorraine Nay        | Lorraine Nay (Business Fax)                 | Lorraine Nay@{(206)      |
| Marta Wolfe-Helene  | Marta Wolfe-Helene (martam@terrafi...       | martam@terrafirm.cc      |
| Marta Wolfe-Helene  | Marta Wolfe-Helene (Business Fax)           | Marta Wolfe-Helene@      |
| Megan Sherman       | Megan Sherman (Business Fax)                | Megan Sherman@{(20       |
| Michael Graff       | Michael Graff (Business Fax)                | Michael Graff@{(206)     |
| <b>Neil Charney</b> | <b>Neil Charney (ncharney@championzo...</b> | <b>ncharney@champion</b> |
| Nichole Peterson    | Nichole Peterson (Business Fax)             | Nichole Peterson@{(2     |
| Pat Kirtland        | Pat Kirtland (patk@terrafirm.com)           | patk@terrafirm.com       |
| Pat Kirtland        | Pat Kirtland (Business Fax)                 | Pat Kirtland@{(206) 5    |
| Patricia Brooke     | Patricia Brooke (Business Fax)              | Patricia Brooke@{(206    |
| Scott Bishop        | Scott Bishop (sbishop@championzo...         | sbishop@championzo       |
| Scott Gode          | Scott Gode (scottg@terrafirm.com)           | scottg@terrafirm.com     |
| Scott Gode          | Scott Gode (Business Fax)                   | Scott Gode@{(206) 5!     |
| Sherri Hart         | Sherri Hart (Business Fax)                  | Sherri Hart@{(206) 5!    |
| Sunil Koduri        | Sunil Koduri (sunilk@terrafirm.com)         | sunilk@terrafirm.com     |

**=> ->**  **OK** **Cancel**

When a person is picked from one of these registers the form is filled out with the person's name, e-mail address, telephone number, caller category and a "More info" link, if applicable.



**Caller:**

Name:  Pavarotti, Jose

E-mail:  pavarotti.jose@kalmstrom.nu

Phone:  (208) 555-8097

Category:  Distribution

[More info](#)

2. The Caller may also be picked from a **drop list** of names, which are beforehand specified under the tab **Caller** in the Settings. Also in this case the e-mail address, telephone number, caller category and URL are filled out automatically, if they are specified in the Caller Settings. *Refer to Caller.*
3. If the Caller is a **new person**, you have to write in the details. If the checkbox for **Auto-add new caller** is checked in the Settings, this caller's name and e-mail address is automatically saved to the database and will thus show up in the Settings under the Caller tab. The next time this caller can be picked according to method 2. For more info about Auto-add *refer to* Ticket form settings.

In the **ticket body** the **Creator** of the ticket writes a description of the **Incident**. The body also has room for a description of the **Solution** to the problem, which is normally written by the **Responsible** person.

An **automatic e-mail about the ticket creation** can be sent to the caller, *refer to* Automatic e-mail to caller when ticket is created.

If an e-mail with the **solution** or request for **more information** should be sent to the caller, just click the **e-mail symbol** to the right of the e-mail field and the e-mail is created. 

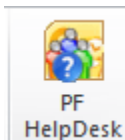


When you click the "Save and Close window" button in the ticket, it will be saved as an **open ticket**, and the ticket window will be closed. You will still have the ticket at hand in Outlook.



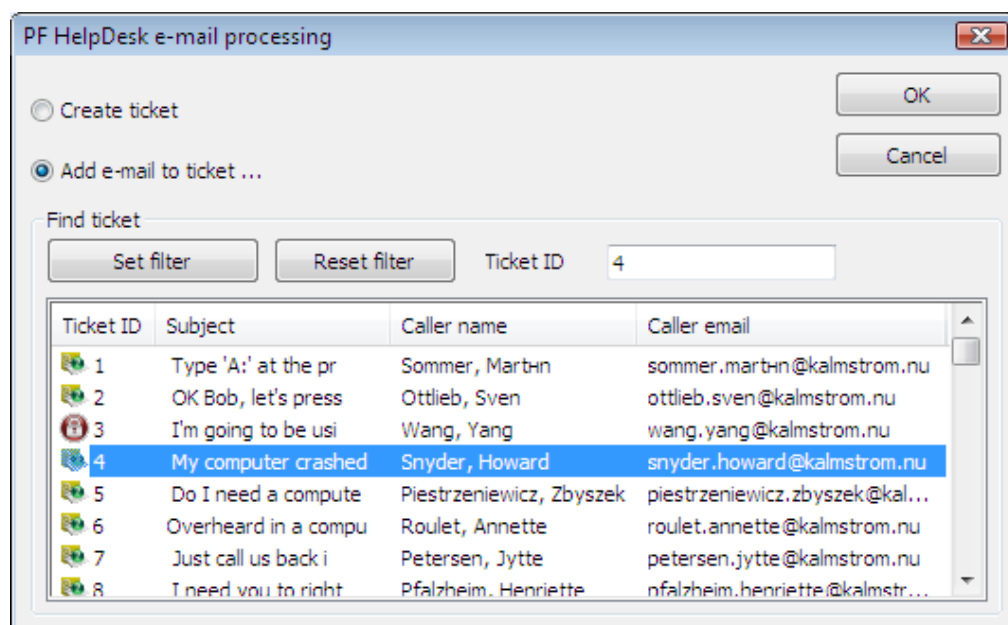
Click the "Close" button when the case is finished. Then the ticket is removed from Outlook and only saved in the database, but it may be opened via the Search Closed tickets feature, *refer to* Search and reopen closed tickets.

#### 4.2 E-MAIL, MANUAL CONVERSION



Convert e-mails to tickets manually with the **Conversion button**, which was added to the Outlook toolbar when you installed the *PF HelpDesk Client Tools*. With this button you may also convert Outlook Task and Appointments into tickets.

Open or select the e-mail, click the *PF HelpDesk* button in the toolbar, and you are shown a dialog that lets you choose between **creating a new ticket** based on the information in the e-mail and **adding the e-mail** information to an existing ticket.



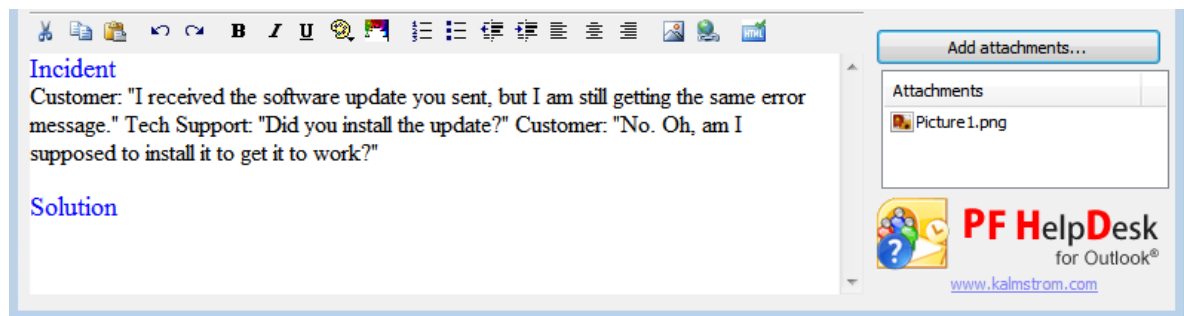


For adding an e-mail to an existing ticket to work, one or both alternatives for **e-mail history** must be enabled under Other settings.

If you select to create a new ticket from the e-mail, the title of the e-mail is set as the Subject, the Caller is the sender of the e-mail and the E-mail address is also always known. Further information about the sender is filled out if preset in the Settings, or if information about the sender is available in the Global Address list or in one of the Outlook Contact folders.

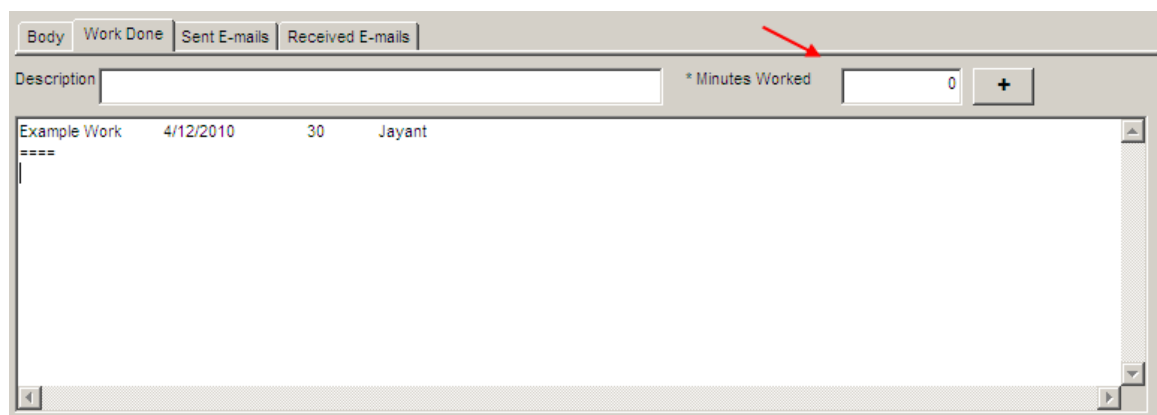
If the Settings checkbox for **Auto-add new caller** is checked, and an e-mail from a caller who is not represented in the Callers list is converted to a ticket, this caller's name and e-mail address is automatically saved to the database and will thus show up in the Settings under the Caller tab. Additional information about the caller might be added there, and next time this caller sends an e-mail that info will be shown. For more info about Auto-add *refer to* Ticket form settings.

The **body text** of the e-mail is placed in the ticket's body. **Attachments** from the e-mail are also copied into the ticket. They are shown in the attachments list to the right and may be opened from there.



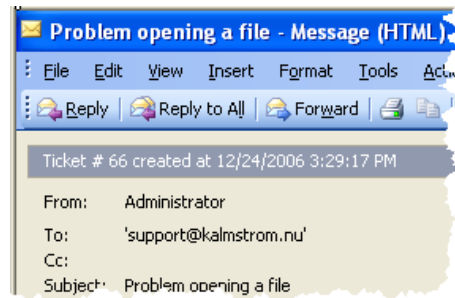
Under the **Work done** tab you may write a description of the work done to the ticket. If minutes worked on the case is *not* filled out, the standard time stated by the administrator for that Incident type in the Settings is suggested automatically when you click "Close" to close the case. If there is no setting under that tab, *PF HelpDesk* takes the default value for all tickets set under the Settings Ticket form tab.

Click the plus sign to add the description (and time) to the non-editable field below. This is especially useful if several people work with the ticket.



When the ticket is posted, the e-mail is tagged with information about ticket number and the time the ticket was created.

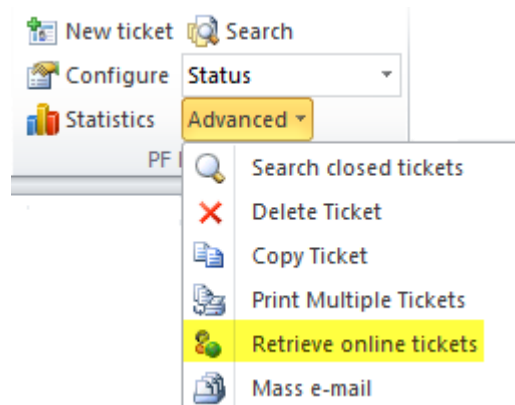
This ticket ID is used for the E-mail history feature.



For information about automatic conversion, *refer to* Automatic conversion of e-mails into tickets.

### 4.3 WEB FORM, MANUAL FETCHING

The tickets from the web form can be fetched **manually**, by pressing the button in the Advanced section or for Outlook 2003 the button in the right side panel. Then it is handled as a ticket converted from an e-mail, see above. The web form button is only shown if a web form is used.



For information about automatic fetching, *refer to* Enable Automatic Tracking.

## 5 WORKING WITH TICKETS

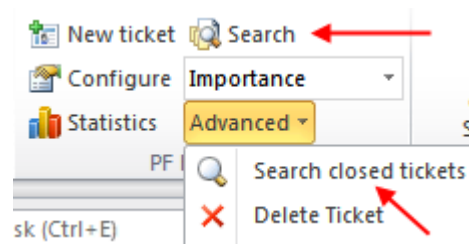
### 5.1 TASK CONVERSION



Tickets can be converted into Outlook Tasks. Just click the **Task** button in the Ticket Toolbar Strip, and a task is created. Click Save and Close, and the task is saved among your other personal Outlook tasks. This procedure does not change the ticket in any way.

### 5.2 SEARCH TICKETS

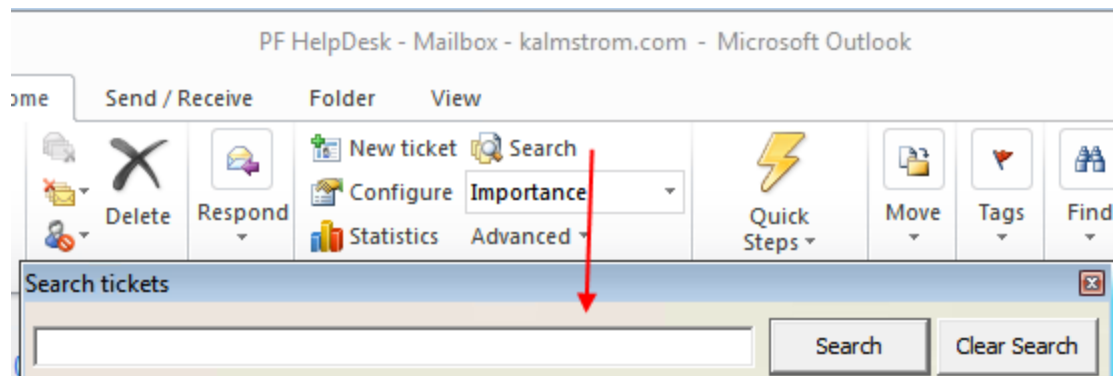
PF HelpDesk has **two Search functions**. Both functions search the full text, and ticket number as well as all other fields can also be searched.





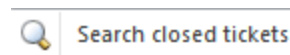
### 5.2.1 Search open tickets

Use the Search button with tickets in the icon when you want to search among open tickets in the PF HelpDesk Outlook folder. Write the search term or number in the search field and click Search. The hits are arranged according to view settings.



### 5.2.2 Search and reopen closed tickets

Closed tickets are only removed from Outlook, not from the database. Therefore you can search and reopen the closed tickets. Search among the closed tickets in the database with the Search button that only has a magnifying glass icon. When this button is clicked, a search form comes up.



Search closed tickets

Incident type: New password Responsible: Buchanan, Steven Free text: Search Advanced...

| 1 | Subject             | Name                 | Incident type | Closed             | Ticket ID |
|---|---------------------|----------------------|---------------|--------------------|-----------|
| 2 | So that'll get me c | Pfalzheim, Henriette | New password  | 8/19/2009 5:15 PM  | 72        |
| 3 | I don't need any of | Perrier, Dominique   | New password  | 6/12/2009 12:30 AM | 40        |

Public Folder HelpDesk Ticket 72

=====

So that'll get me c

=====

Responsible: Buchanan, Steven  
Incident type: New password

Caller:  
=====

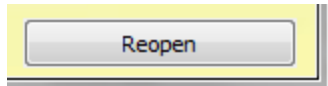
Name: Pfalzheim, Henriette  
E-mail: pfalzheim.henriette@kalmstrom.nu  
Phone: 0221-0644327  
Caller category: Distribution  
Minutes worked: 41

Work  
=====

Reopen

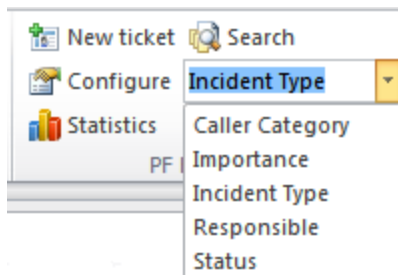
If you click the **Advanced** button you are shown a dialog with much more search alternatives.

To reopen a closed ticket, click on the Reopen button bottom right in the Search dialog.

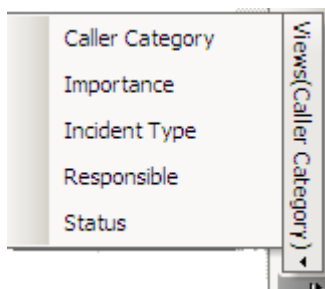


Then this ticket will be shown in the Outlook list again.

### 5.3 VIEWS



The Microsoft Outlook View alternatives can be used also in *PF HelpDesk*, but the application offers as default the possibility of seeing the open tickets categorized in five different ways: Caller category, Importance, Incident type, Responsible and Status. You may also create more views, *refer to* Customize or create new views.

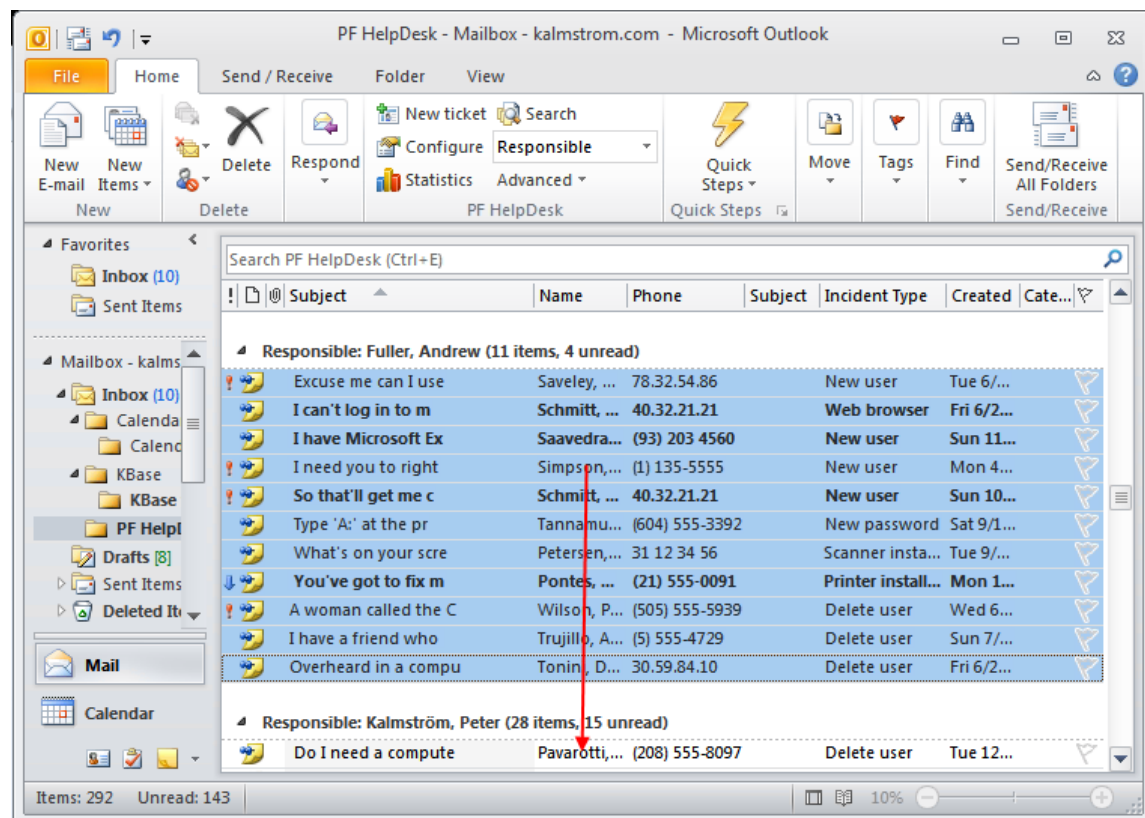


In Outlook 2003 the Views can be selected from the bottom of the right hand toolbar

### 5.3.1 Responsible view used when staff is absent

The **Responsible** view is especially useful when you have to change the responsible person for tickets due to illness or other absence of personnel.

In such cases it is easy to see which unfinished tickets the absent person has and to reassign them to another member of the staff. You may of course open each ticket and change Responsible, but with the Responsible view the task can be done in an easier way: mark the tickets of the absent person and drag and drop them to a new responsible person.



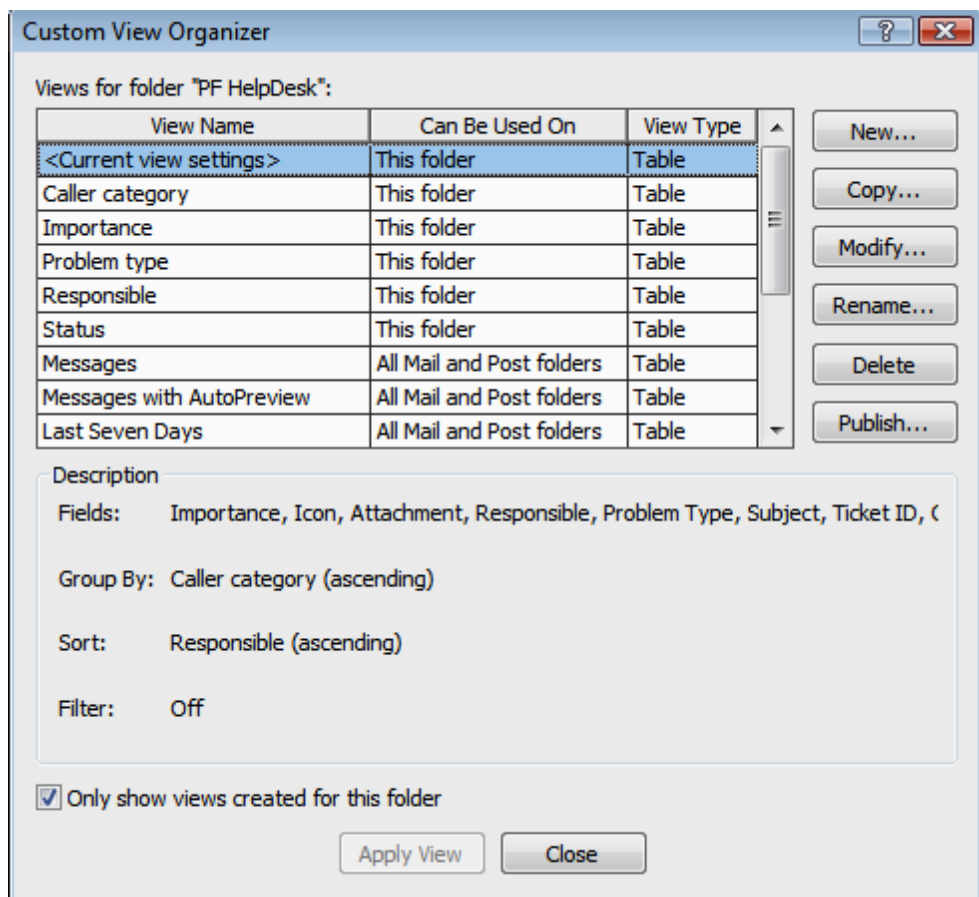
If you only want to move **some of the tickets**, for example those with high priority, hold down the **Ctrl** key and click all tickets you wish to move. Drag and drop these tickets to the new responsible person.

With many open tickets you might not be able to use this method since you cannot see all tickets. In that case, refer to **Fel! Hittar inte referenskölla.**

### 5.3.2 Customize or create new views

To customize the existing views or create new ones:

- for Outlook 2010, select **View >Change view >Manage Views**
- for Outlook 2007, select **Views >Current view >Define Views.**
- for Outlook 2003, use the **Outlook View Editor**, which can be found under **View >Arrange by >Current View >Define views.**

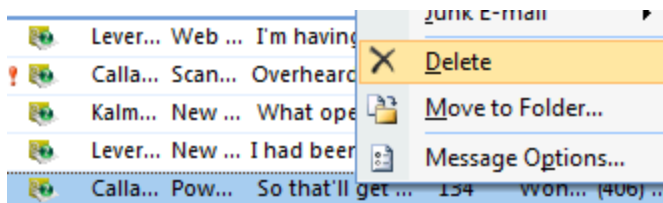


Make a copy of one of the existing views and modify it after your needs. Select User defined fields in folder to use the *PF HelpDesk* values. Also refer to the video demonstrations online, <http://www.kalmstrom.com/products/Outlook/PFHelpDesk/Demonstrations.htm>.

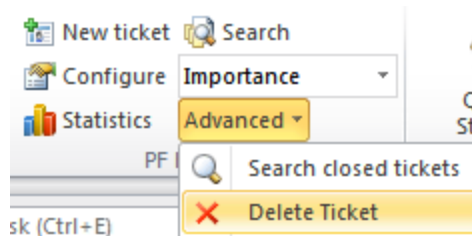
#### 5.4 DELETE TICKETS

A ticket can be deleted in two ways:

- To delete a ticket **only from Outlook** but not from the database, right click it and choose Delete. Since these tickets are still kept in the database, they may be seen in the Statistics. In the *Closed* field of *OLAP Reporting Tool*, you can choose to see data from all tickets, or from only closed or only open tickets.  
**False = not closed (= Open).**  
**True = Closed.** Also refer to Report Customization.



- To delete a ticket **from the database too**, use the **X** button. You are then asked if you wish to delete the corresponding ticket from the database also.



Note that tickets that are deleted from the database cannot be seen in the statistics.

If you want to remove tickets directly from the database (tblTickets), closed tickets have blnClosed = "-1" in an Access database and "1" in an SQL database. Use one of these queries:

Access:

Delete from tblTickets where strTicketID="[TicketID]"

Delete from tblTicketMsgs where intTicketID= [TicketID]

Delete from tblWork where intTicketID= [TicketID]

SQL:

Delete from tblTickets where strTicketID='[TicketID]'

Delete from tblTicketMsgs where intTicketID= [TicketID]

Delete from tblWork where intTicketID= [TicketID]

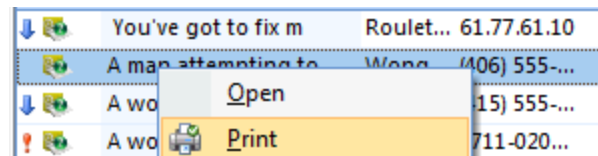
Replace [TicketID]" with the ID of the ticket you want to delete.

## 5.5 PRINT TICKETS

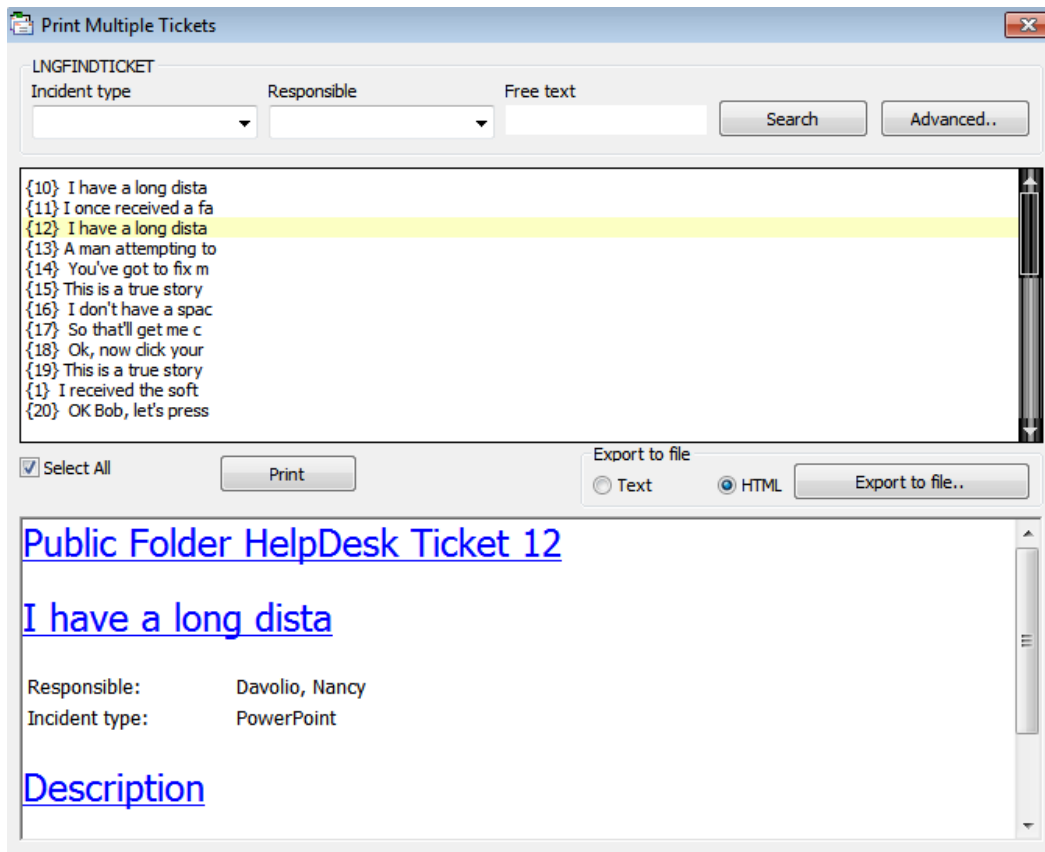
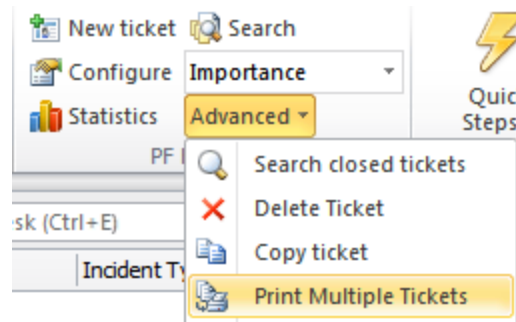
Tickets can be printed one or several at a time. If you have selected to save e-mail history in the ticket body, the ticket will be printed with all its history. *Refer to E-mail history.*

- For printing **one** ticket, **right click** it in the ticket list and select **Print**. The ticket will then be printed.

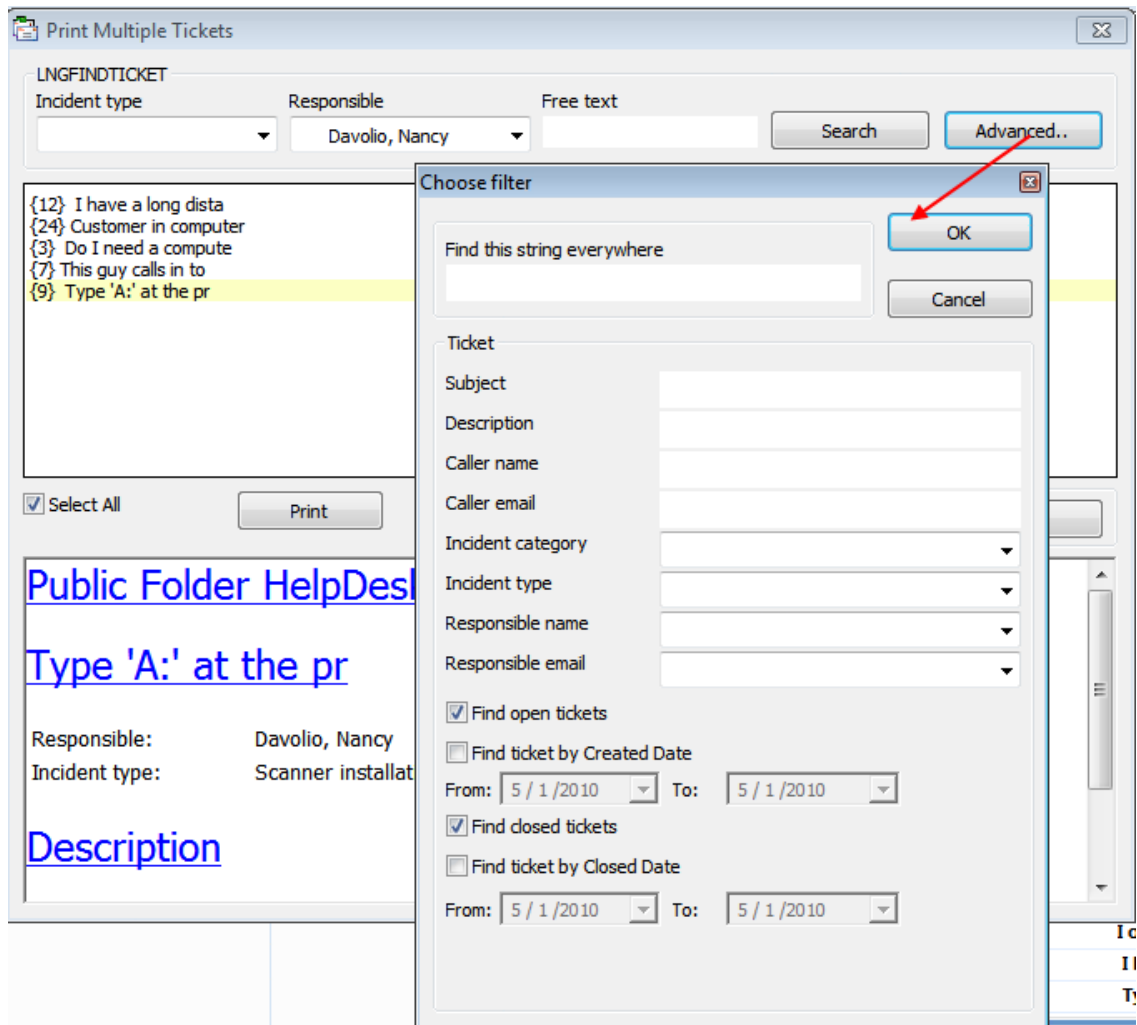
You may also select to press the **Print button in the open ticket**.



- For printing several tickets, click the Multiple print button under Advanced or in the right side panel (2003). You are then shown a dialog where you can **search and select** the tickets you want to print.



If you click the Advanced button more search options are shown.



## 6 INSTALLATION OF PUBLIC FOLDER HELPDESK

PF HelpDesk is a **client-server** application, designed to be easy to install and distribute, and a central installation and configuration takes care of almost everything. The client tools (**PFHelpDeskClientTools.exe**) are installed on the client and runs as an Outlook add-in. The remaining functionality is supplied by executables that do not have to be installed, but rather are run directly from the server when needed.

Our installer does the following:

1. Uncompresses the files to a network path
2. Configures a new Outlook folder. Adds views and sets custom properties to that folder.
3. Allows the user to create or select a database where tickets will be stored.
4. Installs the client tools to the local machine by running the file **PFHelpDeskClientTools.exe** This installation is automatic and silent on the installation machine. On other machines the file has to be run manually from each machine.



## 6.1 PERMISSIONS FOR INSTALLATION

Installation in a **public folder** must be done by a person who has **Write** permission over the **shared network folder** and **Owner** permission over the **PF HelpDesk folder** in Outlook. That person only installs the *PF HelpDesk* workgroup files on a shared network folder. To work with tickets the clients will need to install the *PF HelpDesk* client tools – this is automated if the user accesses the *PF HelpDesk* public folder. It is recommended that the user installing the client tool has **local administrative** rights.

For installation in a **shared mailbox**, *PF HelpDesk* should be installed in the **administrator account** on the server and by the **Owner** of the Outlook mailbox.

Installation to a local PST can be done without needing any special privileges.

## 6.2 MULTIPLE INSTALLATION

It is possible to install *PF HelpDesk* in multiple public folders or mailboxes within an organization. You may have any number of Exchange servers, root file folders and databases, but you may *not* use one *PF HelpDesk* shared file network folder for multiple *PF HelpDesk* Outlook folders. Each *PF HelpDesk* Outlook folder must have its own network file folder.

## 6.3 CENTRAL INSTALLATION

The Administrator installs *PF HelpDesk* by going through the following steps:

### 6.3.1 Create a PF HelpDesk directory

Create a *PF HelpDesk* directory in any shared file folder on your server and install the file you have downloaded (**PFHelpDeskSetup.exe**) into it. You can use either a UNC-path, such as \\servername\sharename, or a mapped drive, such as Y:.

If you choose a mapped drive for installation folder, be aware that the homepage will be seen only for users who have the mapped drive on their computer. If you use it within an organization, be sure that all users have the mapped drive. If someone doesn't have it, he will see "Cannot display the folder. Path does not exist. Verify the path is correct." instead of the *PF HelpDesk* homepage.

Mapped drives are considered to be more secure than UNC paths, but if you specify an UNC path as installation place, all users of the Exchange server will see it.

This creation of a directory can also be done directly when installing, *refer to* Folder path.

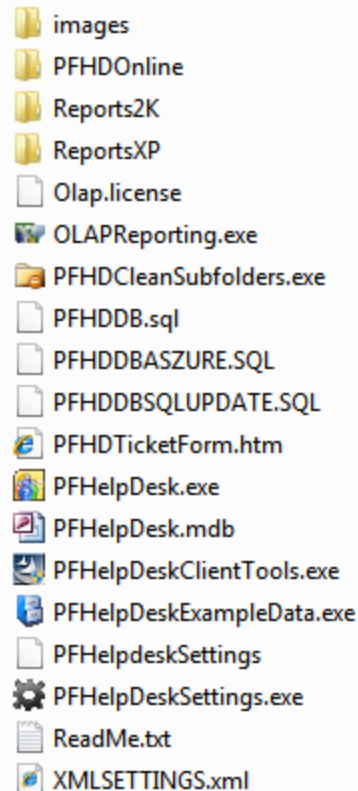


#### PFHelpDeskSetup.exe

In the .exe file all the installation files are wrapped, and when you run the installation it first unzips those files and then configures Outlook.

After the installation is finished, the **PF HelpDesk directory** (the root file folder) will have content similar to that in the picture to the right, where the administrator has made the choices English version and Access database.

The **.mbd file** will only be there if you at the end of the installation choose to create an Access database. If you choose an SQL Server or SQL Azure database, there will be a *PF HelpDesk* connection **.txt file** instead.



#### 6.3.2 Run the Installer

The setup is done from a client machine, not directly on the server, so **from a client** go into the folder where you put the *PF HelpDesk* file and click the *PF HelpDesk* icon to start the installation. Be sure that you are running the application from a shared file folder, as described above.



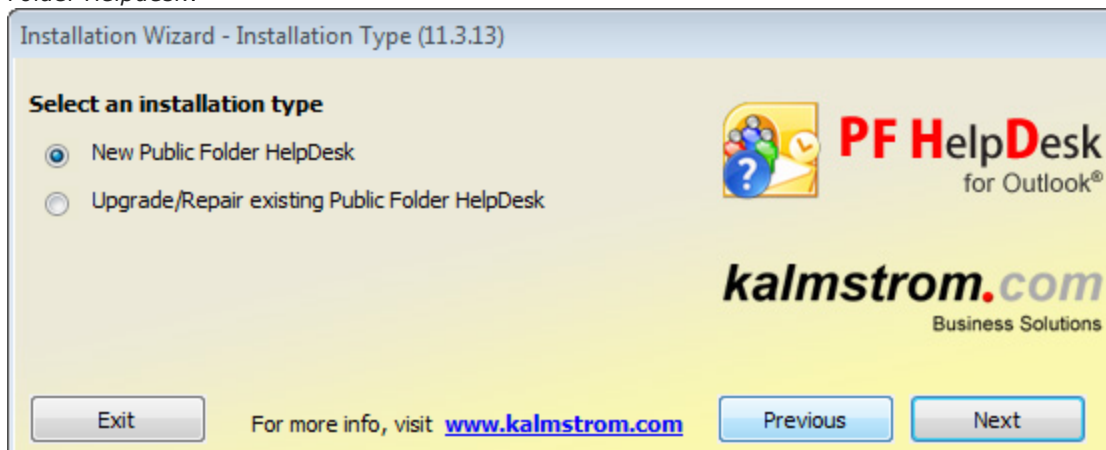
#### License agreement

Before you can start the installation you have to accept the end user license agreement.



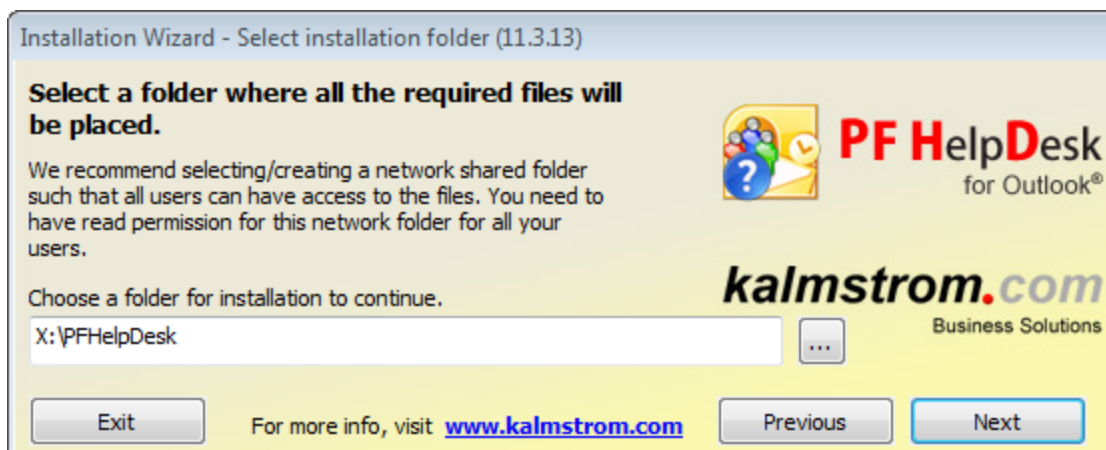
### Installation type

The setup lets you choose between a new installation and an upgrade of *PF HelpDesk* an earlier installation. Below the **new installation** is described. For the Upgrade, refer to Upgrade Public Folder Helpdesk.



### Folder path

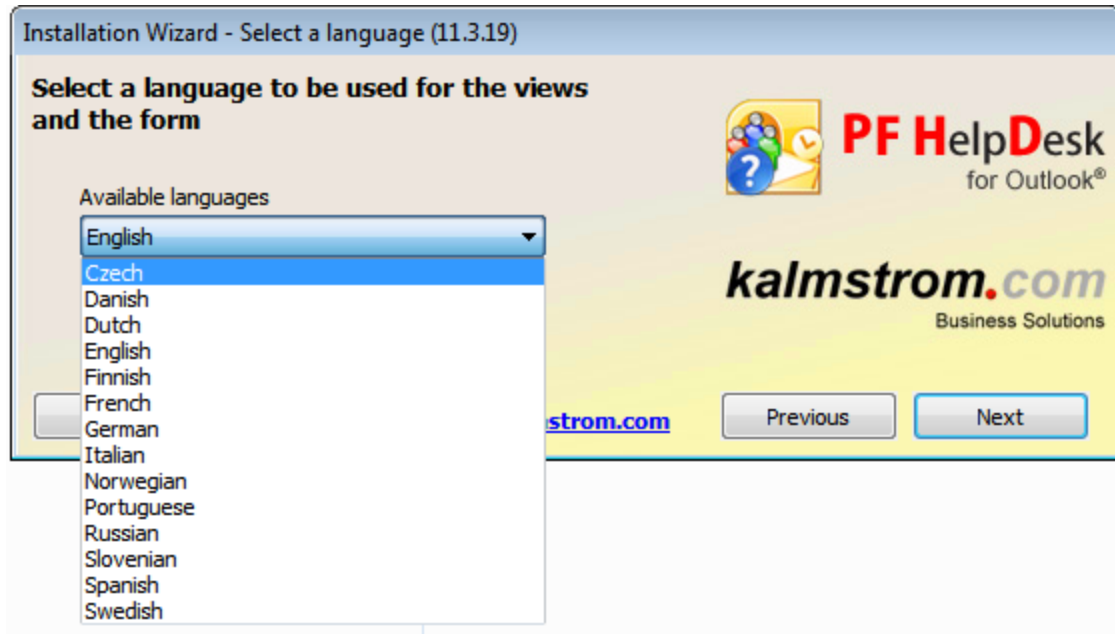
When asked for a folder path, click Browse and browse to, or write in the path of, the **server folder** where you want to install the *PF HelpDesk* files. If you write the name of a nonexistent folder it will be created automatically.





### Select language

The next step is to select language. A number of files, for example the report files, are customized for the different *PF HelpDesk* languages, and each language has specific files. The language selection also determines what language the Outlook form and the Outlook views will be.



When you have selected language the installation can begin, and when you click Next on the screen below the setup starts copying files to the *PF HelpDesk* network folder. The *PF HelpDesk* Client Tools are also installed silently on the machine from where the installation is done. (Other users have to start the client installation manually, refer to *PF HelpDesk* Client Tools.)



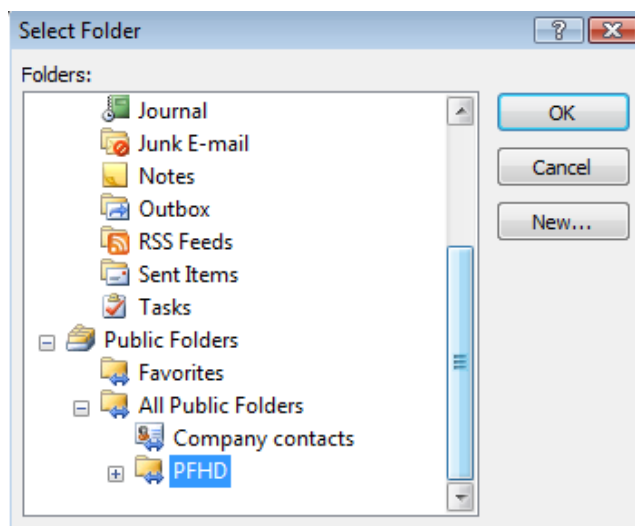
When the installation is nearly finished Outlook needs to be configured to connect to the *PF HelpDesk* files in the network folder.



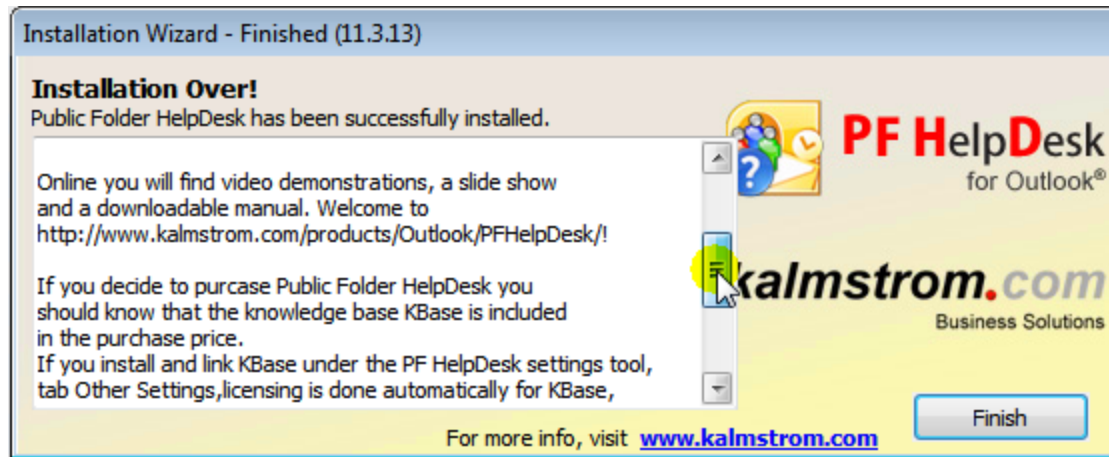
### Create an Outlook folder

To configure Outlook, select or create a folder of the type **Mail and Post Items** in Outlook. There are three ways to install *PF HelpDesk*:

- In your **own mailbox** (for testing)
- In a **public folder**, refer to Installation of *PF HelpDesk* in a Public Folder
- In a shared **mailbox**, refer to Installation of *PF HelpDesk* in a Shared Mailbox



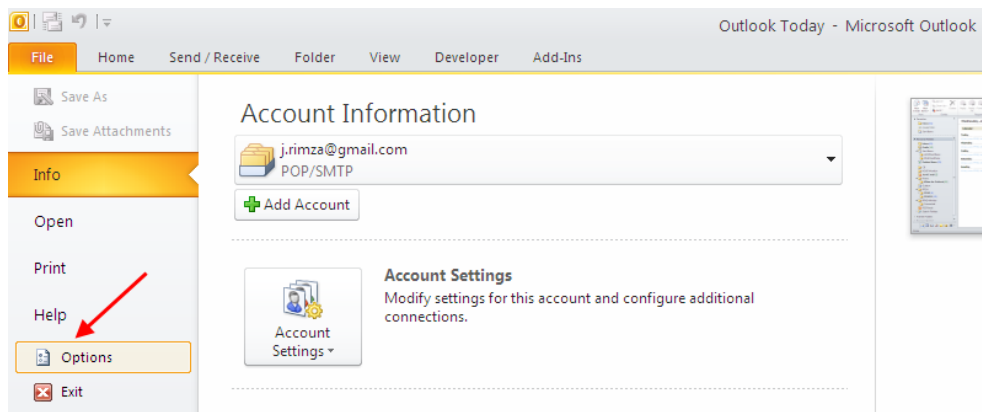
Now the setup of the organizational part is complete and a ReadMe text is shown. Click **Finish**.

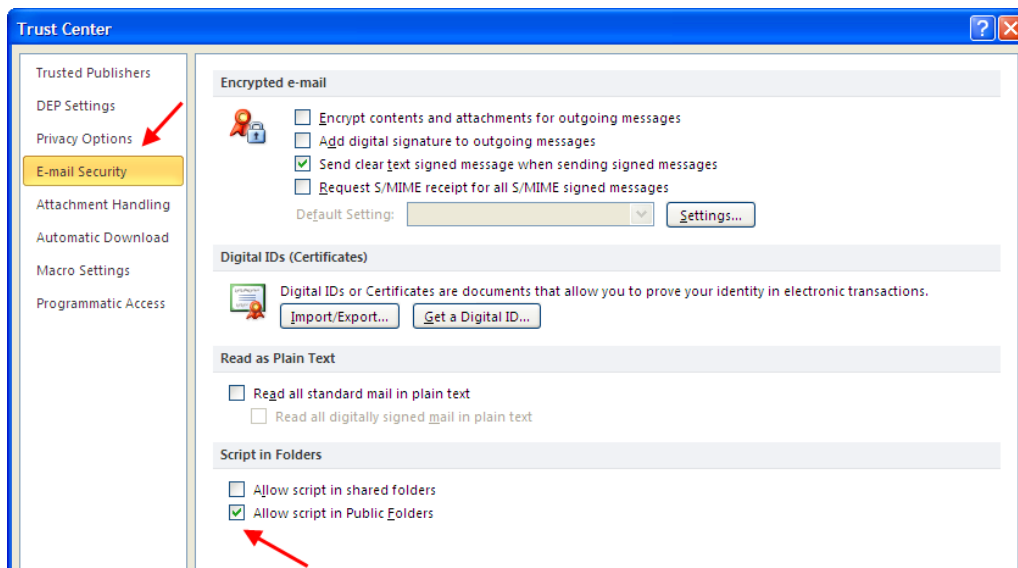
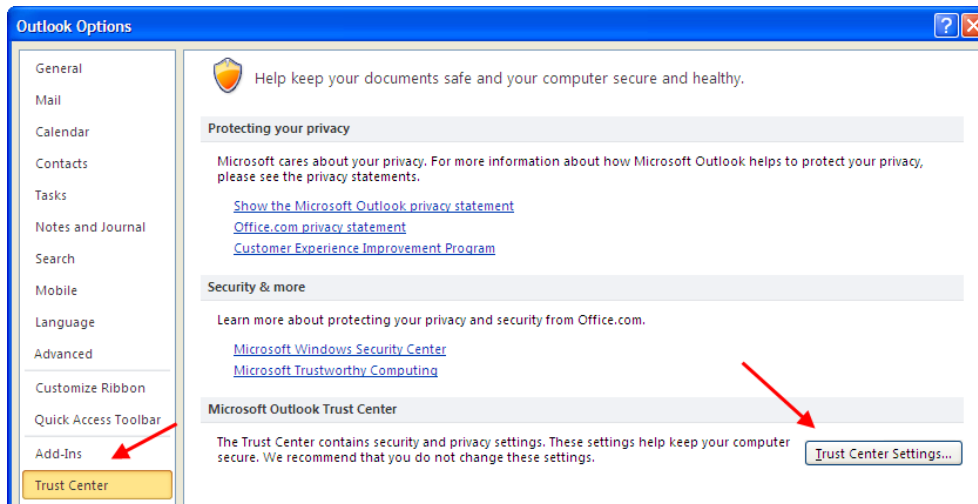


#### 6.4 INSTALLATION OF *PF HELPDESK* IN A PUBLIC FOLDER

To install *PF HelpDesk* in a public folder you have to **allow script in public folders**. This is especially important with Outlook 2010. In earlier versions of Outlook script is allowed by default, but not in 2010. If script is not allowed, the installer cannot set the home page of the *PF HelpDesk* public folder, and it cannot be set manually either.

To allow script in public folders, go to the File tab > Options > Trust Center > Trust Center Settings > E-mail Security and check the box for script in public folders.



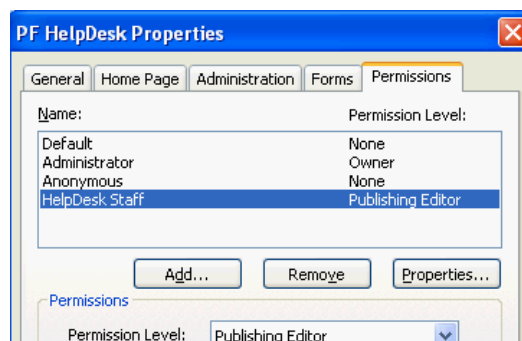


#### 6.4.1 Permissions for users

You need to set the permissions of *PF HelpDesk* in two places, in **Outlook** and in the **root file folder**. If you are using an **SQL** database you also need to set the appropriate permissions there.

In Outlook we recommend **Publishing Editor** permission for the helpdesk staff and None to all others (except the owner, of course).

You may also set the permission to Publishing Author, if you wish that each user should only be allowed to edit his/her own tickets.

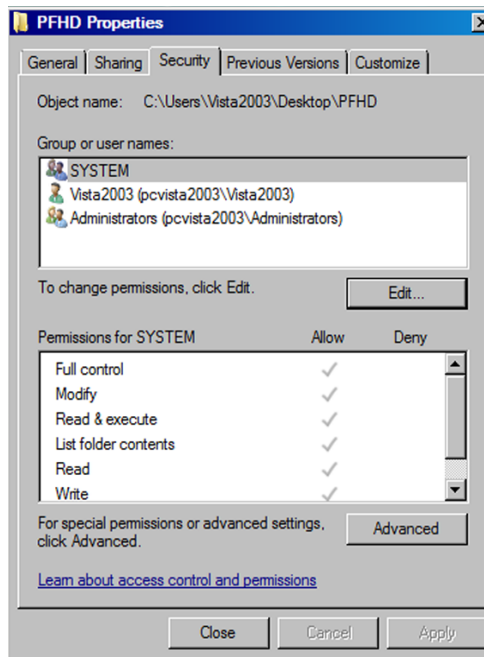




In the root file folder we recommend **full rights** to the helpdesk staff. The ASP script requires full rights to create sub-folders as well as XML documents.

If the web form feature is *not* used, modifying rights is enough.

If you use an **SQL** Server, the staff needs to have **dataReader and dataWrite** permissions over the *PF HelpDesk* database.



#### 6.4.2 Hide/Unhide the Public Folder

If you wish to hide the *PF HelpDesk* public folder you can do that by right clicking the folder and select Properties>Permissions>Select user or group>check or uncheck Folder Visible. Check to make the folder visible, uncheck to hide it.

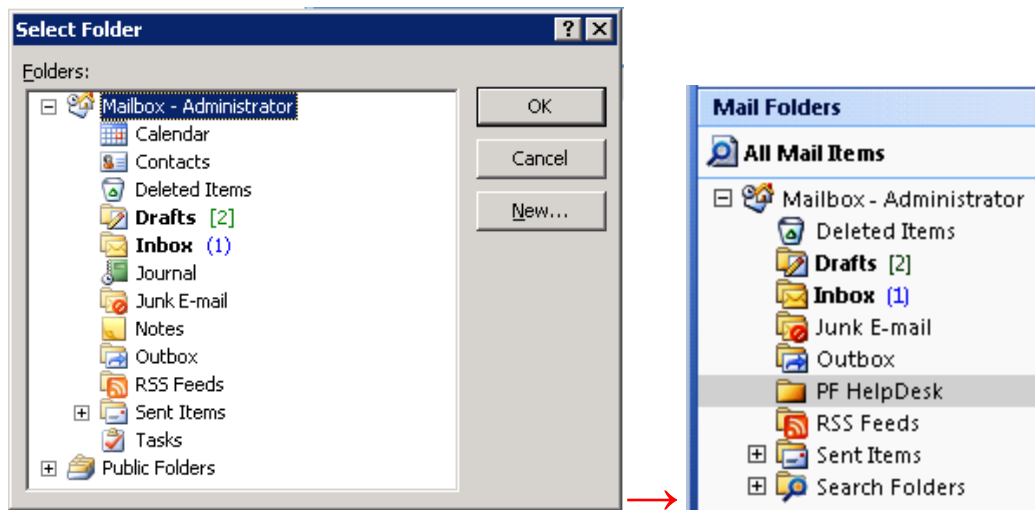
#### 6.5 INSTALLATION OF *PF HELPDESK* IN A SHARED MAILBOX

In spite of the application's name, it is possible to install *PF HelpDesk* in a mailbox and *not* use a public folder. You must still have access to an Exchange server and a mailbox account, though, since sharing a .pst file is not supported by Microsoft.

The mailbox needs to be **shared**, and adequate **permission** must be set so that the helpdesk staff can use it in *PF HelpDesk*. This solution is usually suitable for a small team and may probably be more resource intensive. It comes handy when you want to use a dedicated support e-mail address to convert incoming e-mails to tickets or send/receive e-mails from *PF HelpDesk* (e.g. send on behalf of all your helpdesk staffs). A public folder, as it is already available as public within the organization, is more suitable for a large user base.

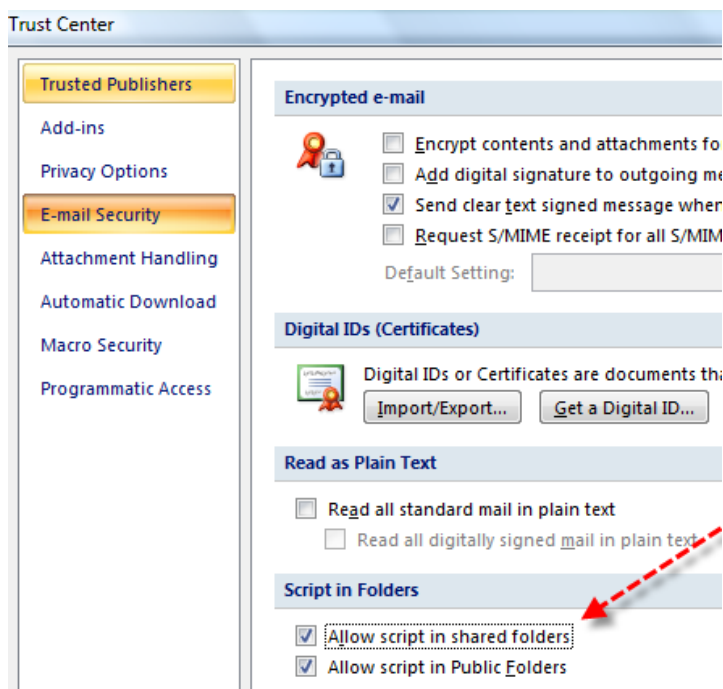
Follow these steps to install *PF HelpDesk* in a mailbox.

1. The installation itself is made as described for public folders above. Install *PF HelpDesk* in the **administrator account** on the server.
2. When you come to the point where you should select an Outlook folder, select a **Mailbox**. This should be a **new** folder that you want to use as the *PF HelpDesk* folder. You cannot install *PF HelpDesk* directly under the Inbox. Now the *PF HelpDesk* folder is being created as a mailbox folder inside the folder you selected.

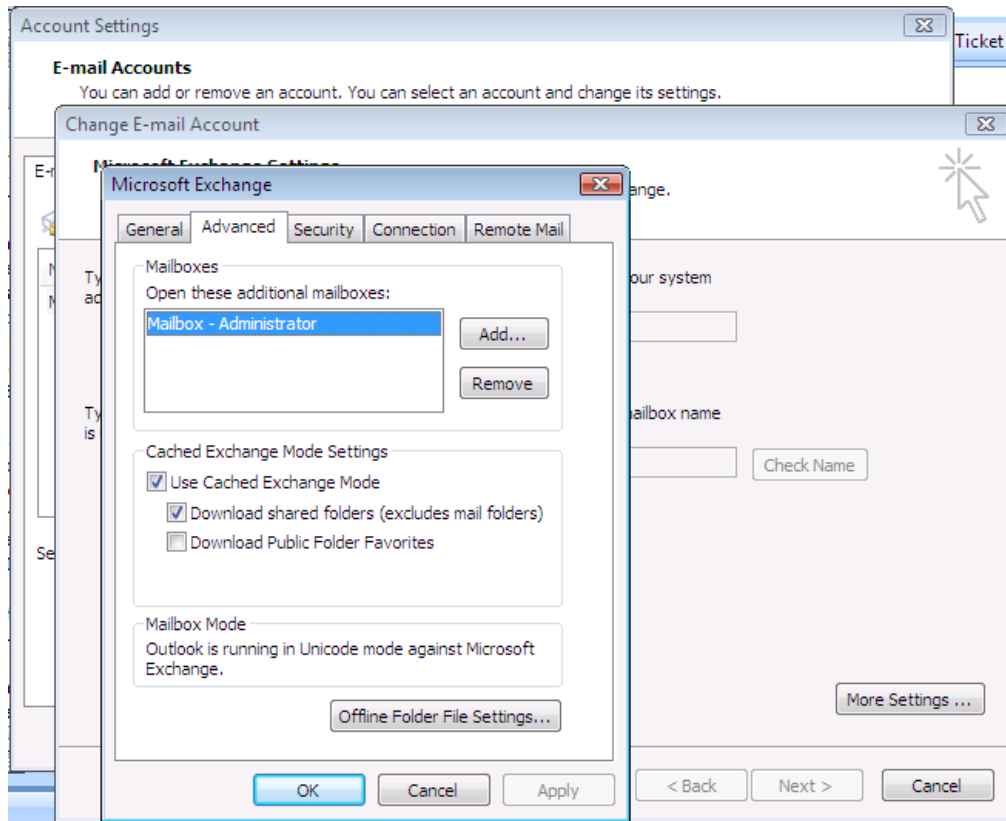


3. Now you have to **allow scripts** in the shared folder. This must be done to show the toolbar to the right in the *PF HelpDesk* homepage.

- In **Outlook 2003**, go into Tools > Options > Other > Advanced Options and check the box Allow script in shared folders.
- In **Outlook 2007**, go into Tools > Trust Center > Email Security.



4. The *PF HelpDesk* staff must add the shared mailbox via Tools > Account Settings > Change E-mail account > More Settings > Advanced tab > Add mailbox.



5. The client tools are installed for each client; refer to *PF HelpDesk Client Tools*.

#### 6.5.1 Permissions for users

If you install *PF HelpDesk* in your mailbox in Outlook and want other people to access it, you have to give them certain permissions over the *PF HelpDesk* folder in your mailbox. We recommend **Publishing Editor**. Also the *PF HelpDesk* folder on the server needs to have permission set to all users who need to access it.

In **Outlook**, go into Tools > E-mail Accounts > View or Change existing e-mail accounts and change the **Exchange server account** by going into More settings and Advanced and **add another mailbox**, the helpdesk mailbox. We recommend **Publishing Editor** permission for the helpdesk staff and None to all others (except the owner, of course).

You may also set the permission to Publishing Author, if you wish that each user should only be allowed to edit his/her own tickets.



**PF HelpDesk Properties** [?] [X]

General | Home Page | AutoArchive  
Administration | Forms | Permissions

| Name              | Permission Level  |
|-------------------|-------------------|
| Default           | Editor            |
| support kalmstrom | Publishing Author |

Add... Remove Properties...

Permissions

Permission Level: Publishing Author

Read

☐ None  
☒ Full Details

Write

☒ Create items  
☒ Create subfolders  
☒ Edit own  
☐ Edit all

Delete items

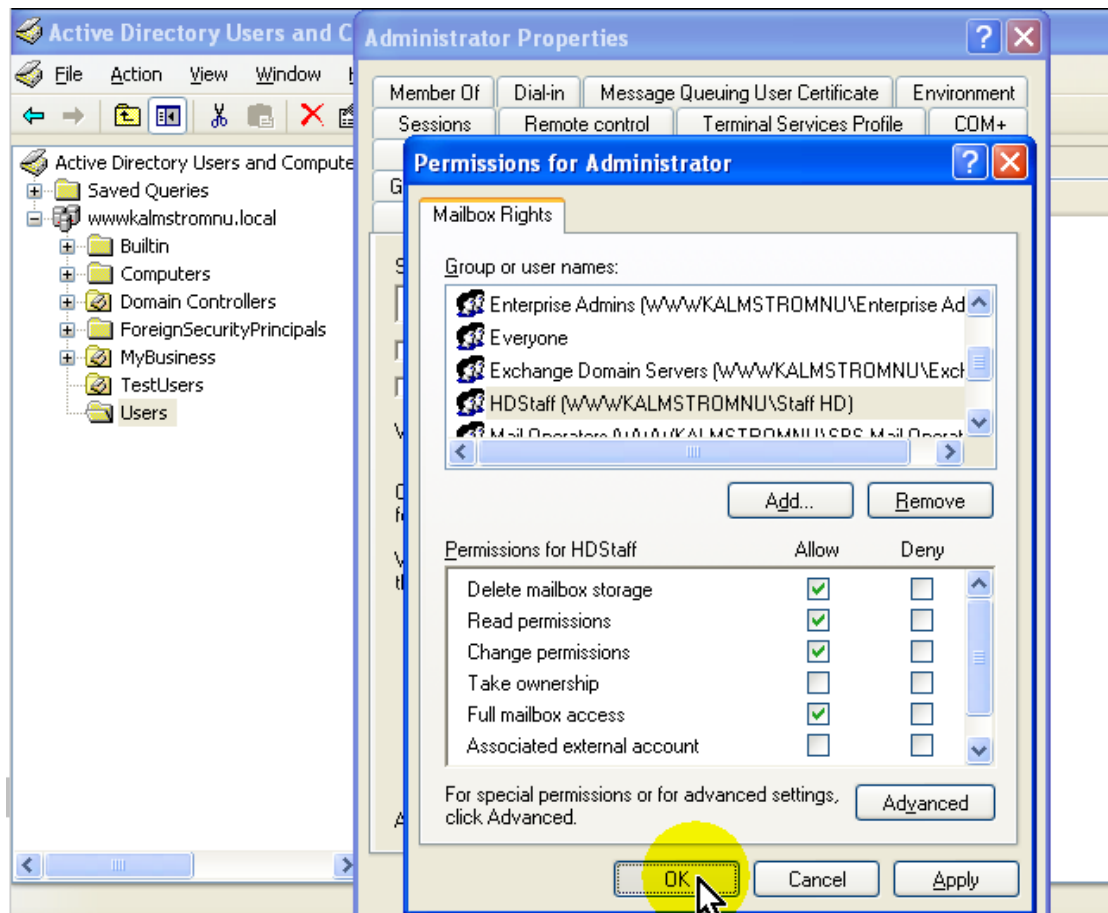
☐ None  
☒ Own  
☐ All

Other

☐ Folder owner  
☐ Folder contact  
☐ Folder visible

OK Cancel Apply

To set permissions on the **administrator account** on the server, go into Active directory >Administrator account >Exchange advanced >Mailbox Rights >Add, and add the people who will be working with the helpdesk – this is easy if you already have created a group for them. Give them **Full mailbox access** and of course permission to **Read** and **Change**.

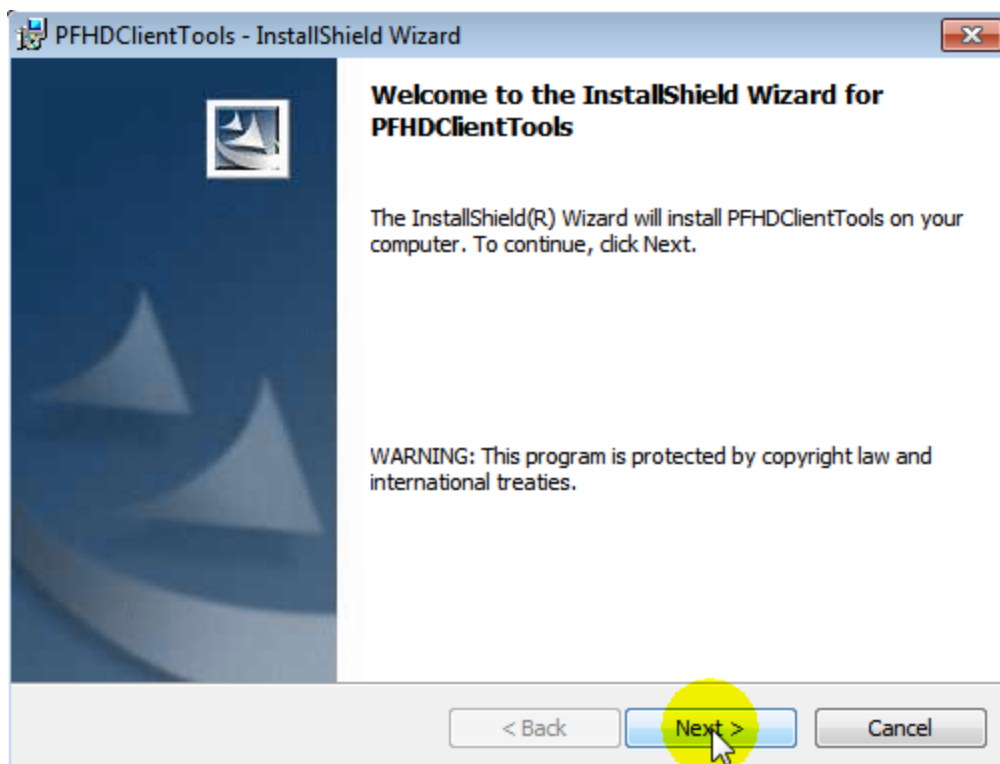
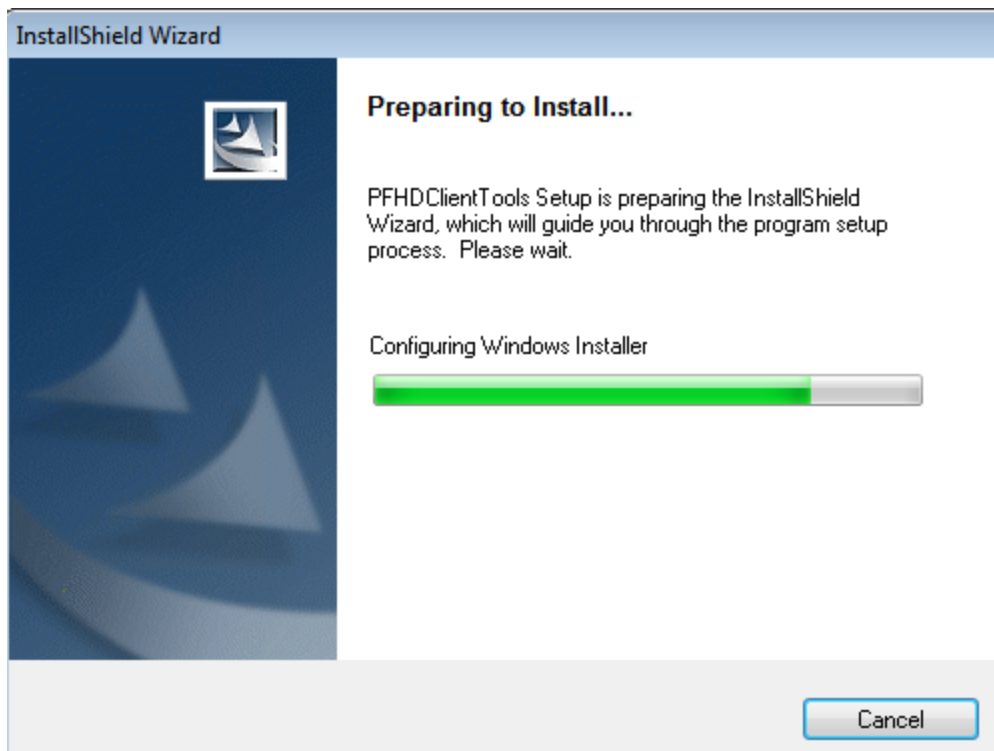


## 6.6 PF HELPDESK CLIENT TOOLS

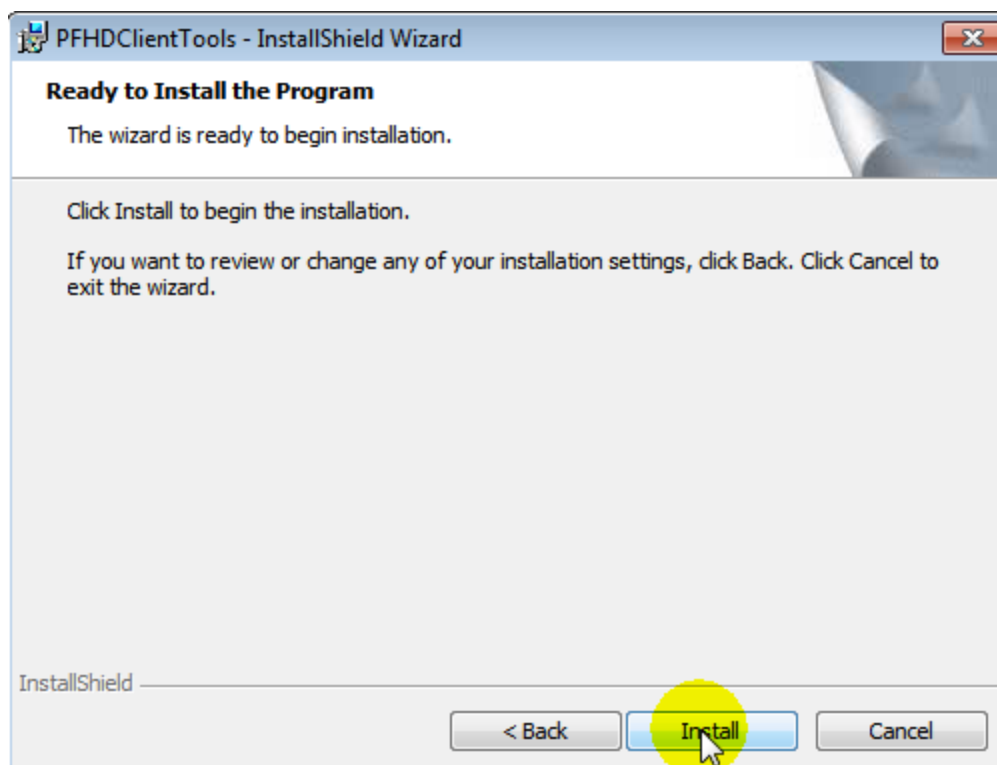
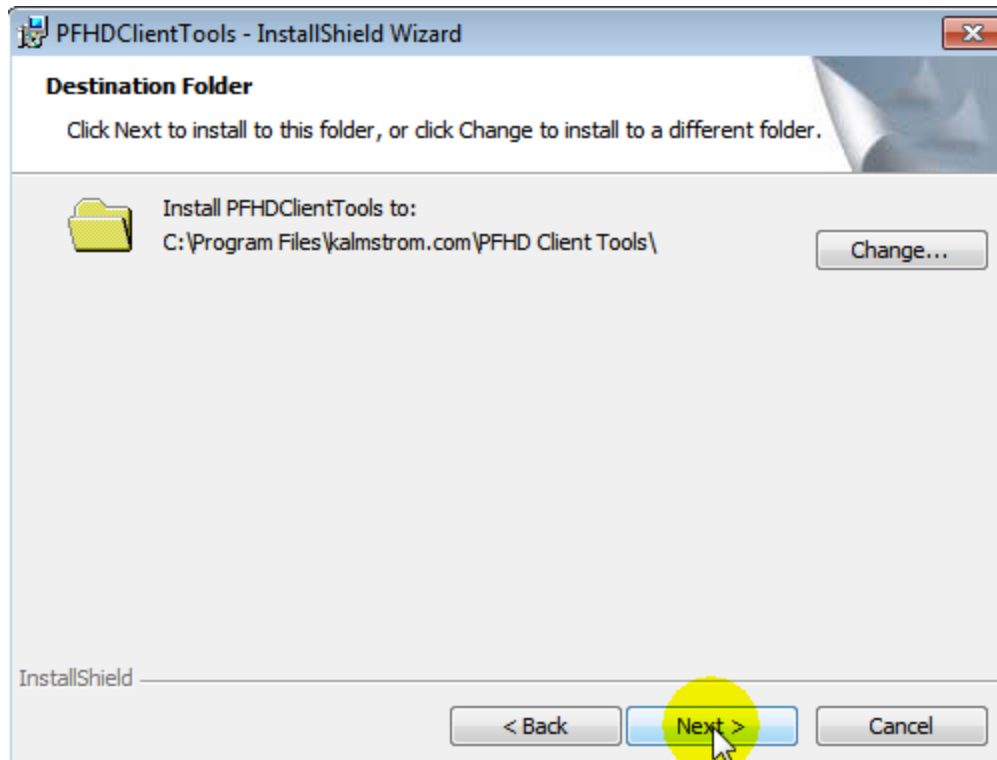
When the central installation is finished the machine from where the installation is made also has the *PF HelpDesk* Client Tools installed. On the installation machine this is done automatically and silently, but it has to be done manually on **each machine** used by someone who works with the tickets.

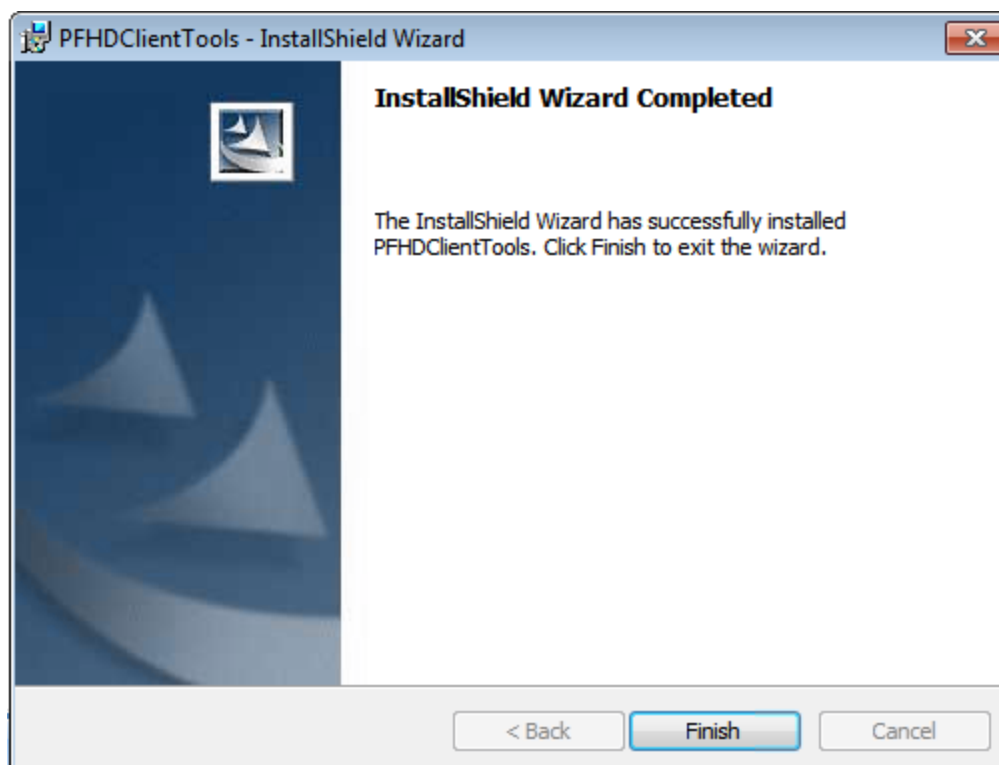
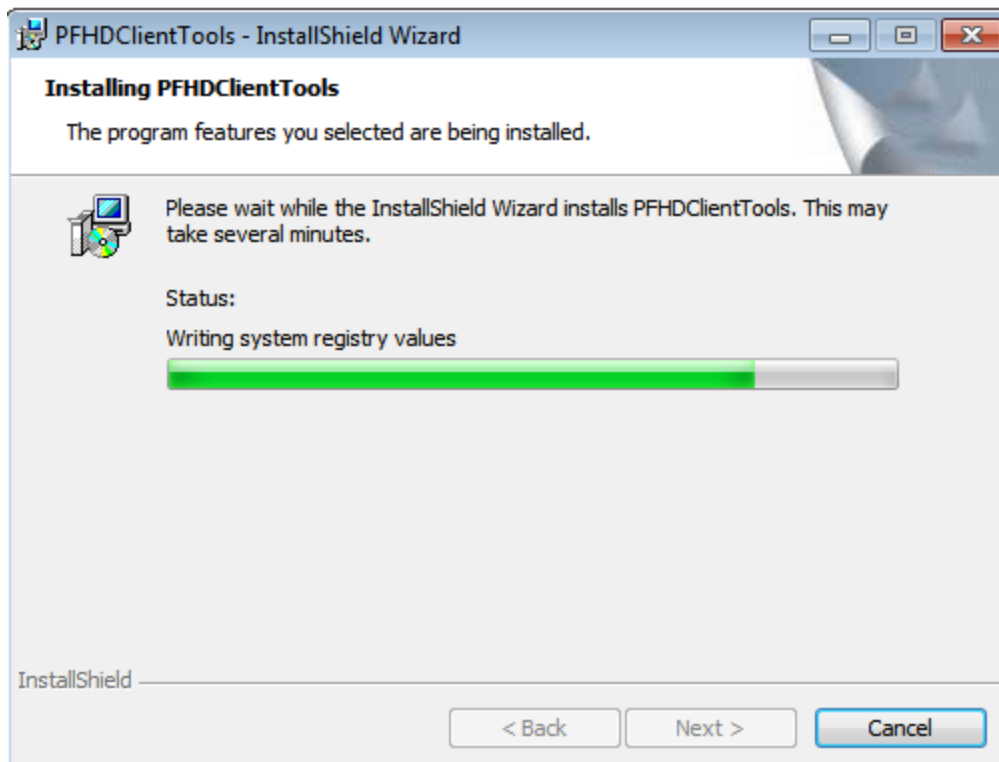
Install the Client Tools manually by going into the server folder and running the file **PFHelpdeskClientTools.exe**. The Client Tool installation is made with an InstallShield Wizard. (This is the only time this file has to be manually run. When the client tools need to be upgraded the user gets a prompt to do so and only has to click Yes.)

When the installation of the *PF HelpDesk* Client Tools is finished, Outlook needs to be **restarted**.



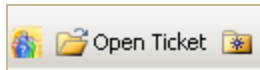
By default the Client Tools are installed in a kalmstrom.com folder under Program Files.



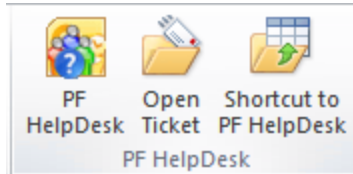


## 6.7 THE PF HELPDESK OUTLOOK BUTTONS

### 6.7.1 In other Outlook folders



(Outlook 2003)



(Outlook 2007 and 2010)

When Outlook is started again after the Client Tools are installed, it has received new *PF HelpDesk* buttons in the toolbar. They are, from left to right:

The *PF HelpDesk* icon button is used when an e-mail, a task or an appointment should be **manually converted** into a ticket; *refer to* E-mail, manual conversion. In Outlook 2010 this icon is replaced with the *PF HelpDesk* icon.

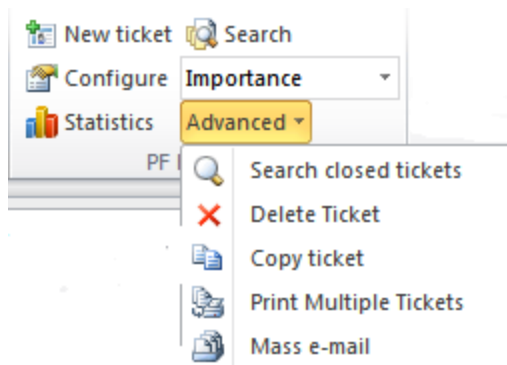
The **Open Ticket** button is *only* visible when you select an e-mail that has been converted to a ticket. Use this button to open the ticket associated with the selected e-mail.

The Open Ticket button also works with e-mails sent to admin specified users when a new ticket is created, *refer to* E-mail notification when ticket is created and with e-mails sent to the person responsible for the ticket (refer to Manual e-mail to the responsible and Automatic e-mail to Responsible on reply received).

The *PF HelpDesk* Outlook toolbar also has a **shortcut** to *PF HelpDesk*.

### 6.7.2 In the PF HelpDesk Outlook folder

When you enter the *PF HelpDesk* folder you will get buttons needed for work with the tickets instead. For Outlook 2010 you will find them in the ribbon, but Outlook 2003 and 2007 has them in a panel to the right of the ticket list, see below.



The buttons are:

- **New ticket** – Create a ticket that is not converted from an e-mail.
- **Settings** –The *PF HelpDesk* administrator settings, *refer to* The *PF HelpDesk* Settings.
- **Statistics** – This button opens the integrated statistics tool, *OLAP Reporting Tool*. *Refer to* Statistics.
- **Search open tickets**
- **View selection**



- **Search closed tickets** – Use this button to search among the closed tickets, *refer to* Search and reopen closed tickets.
- **Delete** – This button deletes a ticket from **both** Outlook and the database. *Refer to* Delete tickets.
- Create **duplicate** copy of ticket – Use this button to copy a ticket.
- **Print multiple tickets** – Use this button for printing several tickets. You are then shown a dialog where you can search and select the tickets you want to print. Also *refer to* Print tickets.
- **Mass E-mailing** – This button opens up a dialog where you can select callers within a category. By default all the callers in a category are ☐elected, but you may of course uncheck some of them. When you click OK a blank e-mail is opened up, with all the selected e-mail addresses in the BCC field.

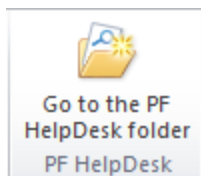


If the web form is used, an eighth button for **manually fetching tickets from webform** will be shown, *refer to* Web form, manual fetching.

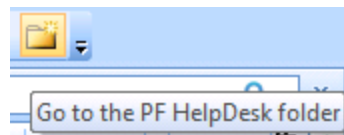


#### 6.7.2.1 The “Go to PF HelpDesk folder” button

If for some reason the *PF HelpDesk* client tool is not able to find the *PF HelpDesk* network folder path and run the file *PF HelpDesk.exe*, another button will be visible in the Outlook toolbar: Go to the PF HelpDesk folder. If the user browses to the *PF HelpDesk* network folder this path will be saved and the client tools can then run *PFHelpDesk.exe*.

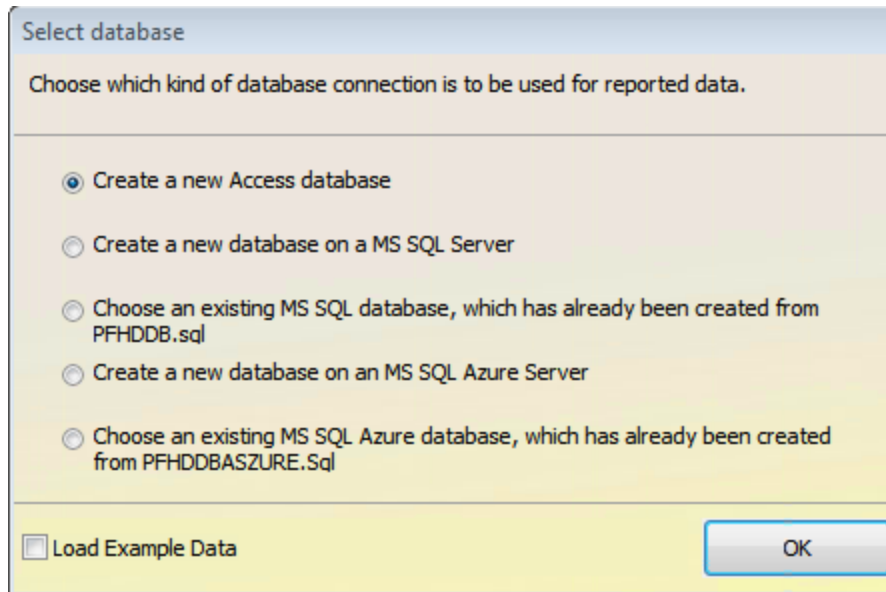


Outlook 2010:



Outlook 2007 and 2003:

## 6.8 SELECT DATABASE



When you open *PF HelpDesk* after the client tools installation on the machine you performed the installation from, you are asked to choose what **kind of database** should be used for *PF HelpDesk*.

These are the alternatives:

1. A new Microsoft **Access** database.  
To create an MS Access database you do NOT need to have MS Access installed. *PF HelpDesk* will create the database in the server folder where you have the other *PF HelpDesk* files. The file will be named **PFHelpDesk.mdb**.  
  
NOTE that the Access database is not a good choice if the database goes big. For example, Access 2007 supports 2 GB but starts creating trouble before that. In that case we suggest an SQL database for better performance.
2. A Microsoft **SQL Server** database.  
You can either let *PF HelpDesk* create the database or create a database in advance from the file **PFHddb.sql**. To use this alternative you must have an SQL Server, and in the *PF HelpDesk* server folder you will only get a text file, **DBconnection .txt**, with the connection string for the *PF HelpDesk* SQL Server database.
3. A Microsoft **SQL Azure** database.  
SQL Azure is a cloud-based service from Microsoft, which offers data storage capabilities as a part of the Azure Services Platform. You can either let *PF HelpDesk* create the database or create a database in advance from the file **PFHddbAZURE.sql**. To you use this alternative you must have an Azure Services subscription, and in the *PF HelpDesk* server folder you will only get a text file, **SqlAzureDBConnection.txt**, with the connection string for the *PF HelpDesk* SQL Azure database.

If you select the **Access** alternative, the database will be **created at once**.

For the **SQL-databases** you will first be asked for data:



SQL Server settings

Server

Database

☒ Use trusted connection - recommended

User name

Password

OK Cancel

SQL Azure settings

Server

Database

User name

Password

OK Cancel

## 6.9 EXAMPLE DATA

Select database

Choose which kind of database connection is to be used for reported data.

- ☒ Create a new Access database
- ☐ Create a new database on a MS SQL Server
- ☐ Choose an existing MS SQL database, which has already been created from PFHddb.sql
- ☐ Create a new database on an MS SQL Azure Server
- ☐ Choose an existing MS SQL Azure database, which has already been created from PFHDDBASZURE.Sql

☒ Load Example Data

OK

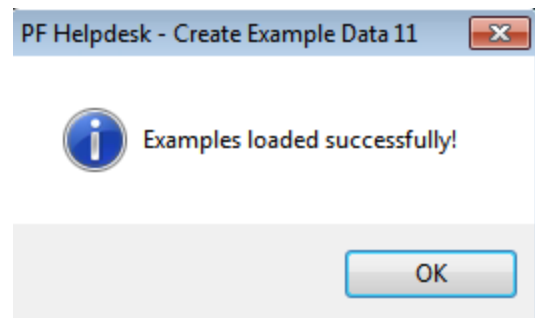
When you have selected the database you are given a possibility to load **Example Data**. If the software is new to you, it might be a good idea to load the example data. It gives you an opportunity to see how *PF HelpDesk* works when you have much data in it, what performance you can expect and so on.

You may of course also choose *not* to load the example data. In that case you instead insert your own information from the beginning. If you would change your mind later you can always load Example data by clicking the file **PFHelpDeskExampleData.exe** in the *PF HelpDesk* network folder.



If you load example data you may choose how many tickets should be open and how many should be closed. The tickets are first stored in both Outlook and the database. When a ticket is closed it is only stored in the database. Decide the number of tickets you wish to be open and therefore stored in Outlook *and* in the database and how many should be regarded as closed and stored only in the database. If you wish, you can also change the Start Date.

PF HelpDesk randomizes the desired number of tickets from the starting date. Click OK, and those tickets will be created. When the Example data are installed you can see the tickets in Outlook, and you can also check them by going into the database and by clicking the Statistics button (for more information about the statistics tool, *refer to* Statistics). In the Settings information from the Example data are filled out under some of the tabs.



#### 6.9.1 Remove Example Data

The easiest way to remove the Example Data is to **first remove all open tickets in Outlook and then remove the whole database**. You will be asked to select a new one next time you start PF HelpDesk. This must be done by the administrator.

For **Access**, delete the file **PFHelpDesk.mdb** in the PF HelpDesk network share. Then open the PF HelpDesk folder in Outlook and you will be asked to choose a new database.

For **SQL Server**, remove the **DBConnection.txt** file from the PF HelpDesk network share. Then open the PF HelpDesk folder in Outlook and you will be asked to choose a new database. Choose SQL server again and use the same name as before. That will replace the old existing PF HelpDesk database with the new one.

If you already have created your own tickets that you want to keep, you have to remove the Example Data manually from the PF HelpDesk Settings and the database.

## 7 THE PF HELPDESK SETTINGS

The *PF HelpDesk* Settings are reached through the **Configure button** in Outlook or through the file **PFHelpDeskSettings.exe** in the root file folder. In the Settings dialogs, the administrator adapts *PF HelpDesk* to the organization's needs. All Settings data is saved in the database you have created for use with *PF HelpDesk*.

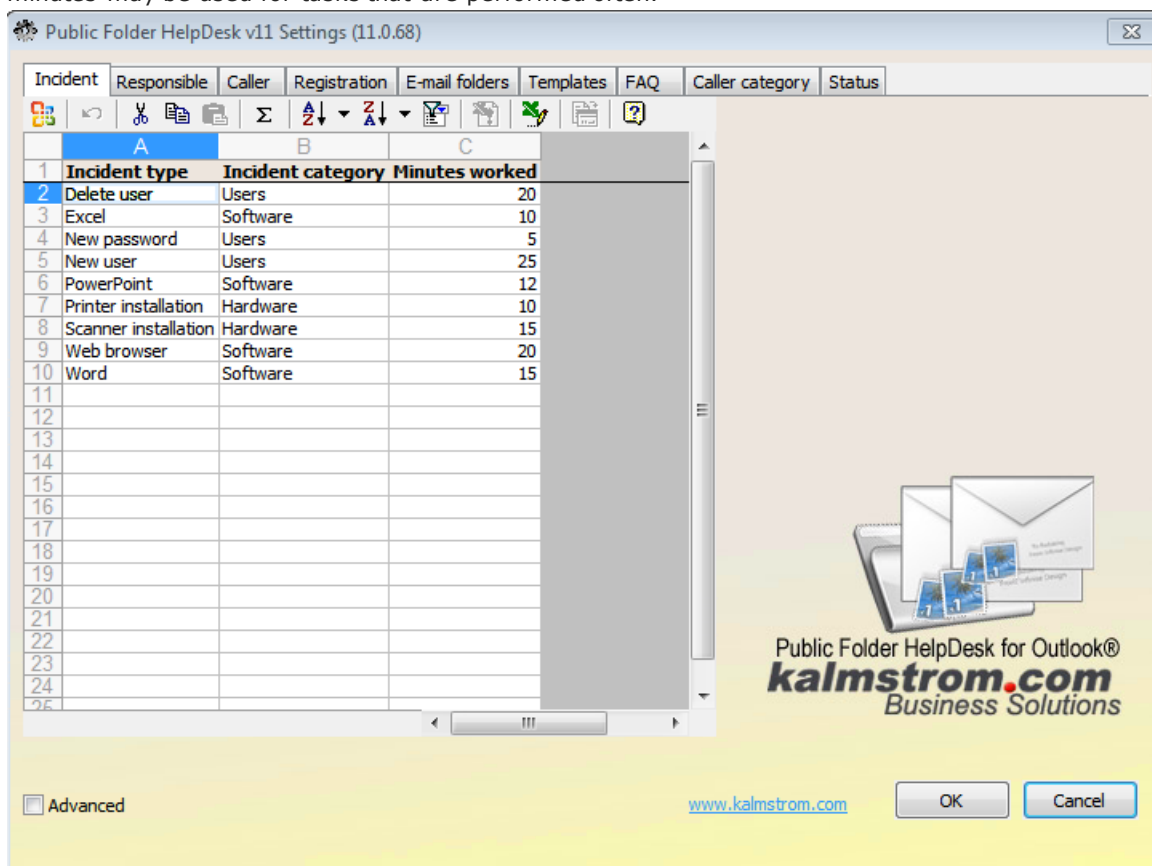
The Settings have default tabs and others which are reached by checking the **Advanced** box. The tabs described in 7.10–7.12 below are reached by checking the box Advanced, bottom to the left.

All the Settings lists are ordinary **Excel lists**, so you can work with them just as you would in Excel.

## 7.1 INCIDENT TAB

Here is decided **what kind of Incidents should be tracked** in the helpdesk system. The Incidents are sorted into **Incident Types**, which are selected in the tickets by the support staff. You may also group the Incident types into **Incident Categories**, which are useful in the statistics. To make the work easier for the helpdesk staff, the categories are not shown in the ticket form.

**Minutes worked** indicates how many minutes it should take to solve the specific problem, or how many minutes it usually takes. When a ticket is closed without any minutes worked being filled out, the minutes defined here are added to the ticket and shown in the statistics. This way standard minutes may be used for tasks that are performed often.



|    | A                    | B                 | C              |
|----|----------------------|-------------------|----------------|
|    | Incident type        | Incident category | Minutes worked |
| 1  |                      |                   |                |
| 2  | Delete user          | Users             | 20             |
| 3  | Excel                | Software          | 10             |
| 4  | New password         | Users             | 5              |
| 5  | New user             | Users             | 25             |
| 6  | PowerPoint           | Software          | 12             |
| 7  | Printer installation | Hardware          | 10             |
| 8  | Scanner installation | Hardware          | 15             |
| 9  | Web browser          | Software          | 20             |
| 10 | Word                 | Software          | 15             |
| 11 |                      |                   |                |
| 12 |                      |                   |                |
| 13 |                      |                   |                |
| 14 |                      |                   |                |
| 15 |                      |                   |                |
| 16 |                      |                   |                |
| 17 |                      |                   |                |
| 18 |                      |                   |                |
| 19 |                      |                   |                |
| 20 |                      |                   |                |
| 21 |                      |                   |                |
| 22 |                      |                   |                |
| 23 |                      |                   |                |
| 24 |                      |                   |                |
| 25 |                      |                   |                |

☒ Advanced

[www.kalmstrom.com](http://www.kalmstrom.com)

## 7.2 RESPONSIBLE TAB



Under the **Responsible** tab you list the **people working at the helpdesk**, their e-mail addresses and their hourly rates. The currency will be the one already specified for your system. The rate is divided with 60, so you may easily see the cost for a ticket in the statistics, where the minutes for the tickets are multiplied with the divided rate.

For each caller the admin can set one **default Responsible**, whose name is automatically filled out in the ticket, *refer to* Caller below.

If no default Responsible is set, the Responsible person is selected manually from the dropdown in the ticket.

If you want to create several Responsibles, you can create and enter a group of people. For example you could create an entry like "Java team" or "Engineering department" etc. Enter the e-mail addresses with a ";" between, just like in an e-mail.

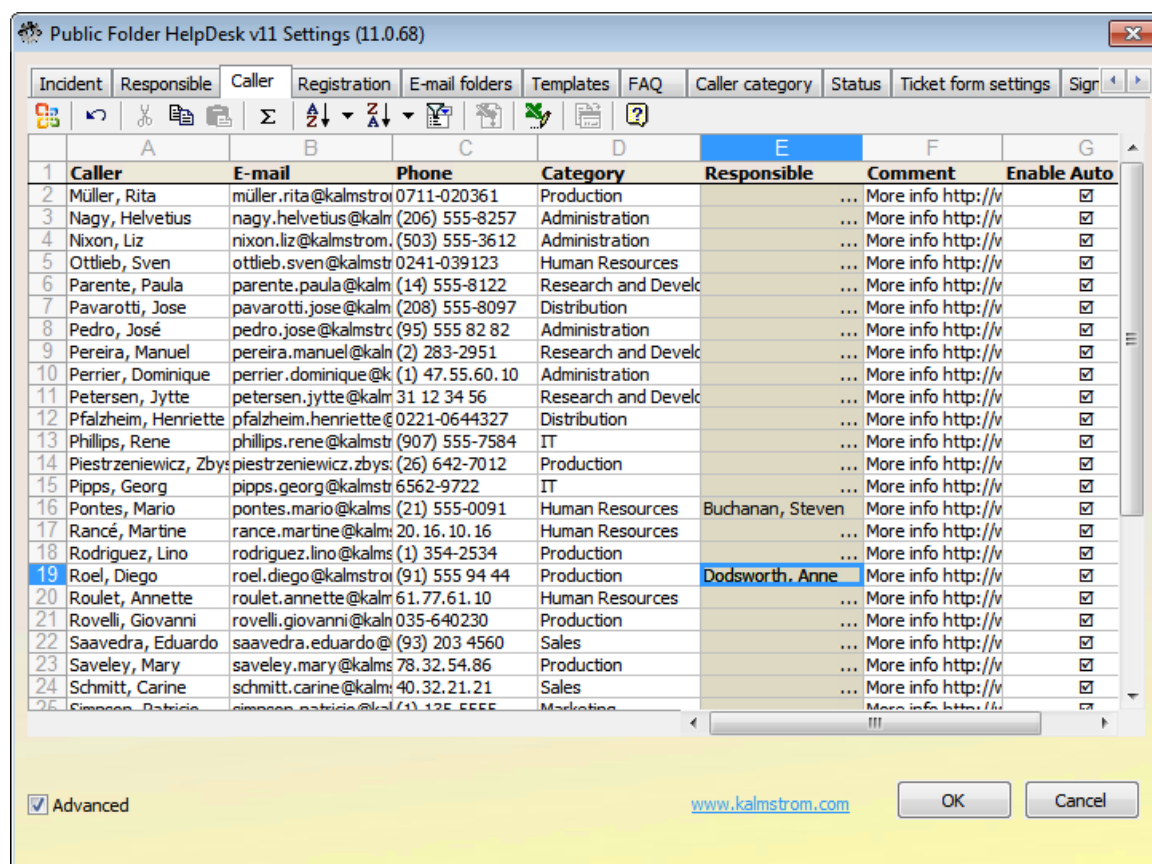
|    | A                 | B                             | C        |
|----|-------------------|-------------------------------|----------|
|    | Name              | E-mail                        | Rate     |
| 1  | Buchanan, Steven  | steven.buchanan@kalmstrom.nu  | \$90.00  |
| 2  | Callahan, Laura   | laura.callahan@kalmstrom.nu   | \$125.00 |
| 3  | Davolio, Nancy    | nancy.davolio@kalmstrom.nu    | \$100.00 |
| 4  | Dodsworth, Anne   | anne.dodsworth@kalmstrom.nu   | \$110.00 |
| 5  | Fuller, Andrew    | andrew.fuller@kalmstrom.nu    | \$75.00  |
| 6  | Kalmström, Peter  | peter@kalmstrom.nu            | \$120.00 |
| 7  | King, Robert      | robert.king@kalmstrom.nu      | \$65.00  |
| 8  | Kula, Kalle       | kalle.kula@kalmstrom.nu       | \$55.00  |
| 9  | Leverling, Janet  | janet.leverling@kalmstrom.nu  | \$85.00  |
| 10 | Peacock, Margaret | margaret.peacock@kalmstrom.nu | \$120.00 |
| 11 | Stensson, Stina   | stina.stensson@kalmstrom.nu   | \$100.00 |
| 12 |                   |                               |          |
| 13 |                   |                               |          |
| 14 |                   |                               |          |
| 15 |                   |                               |          |
| 16 |                   |                               |          |
| 17 |                   |                               |          |
| 18 |                   |                               |          |
| 19 |                   |                               |          |
| 20 |                   |                               |          |
| 21 |                   |                               |          |
| 22 |                   |                               |          |
| 23 |                   |                               |          |
| 24 |                   |                               |          |
| 25 |                   |                               |          |

Both **Incident Type** and **Responsible** can also be added to the database directly from the ticket. If a user writes a nonexistent value in one of these fields, he is by default asked if he wants to add it.

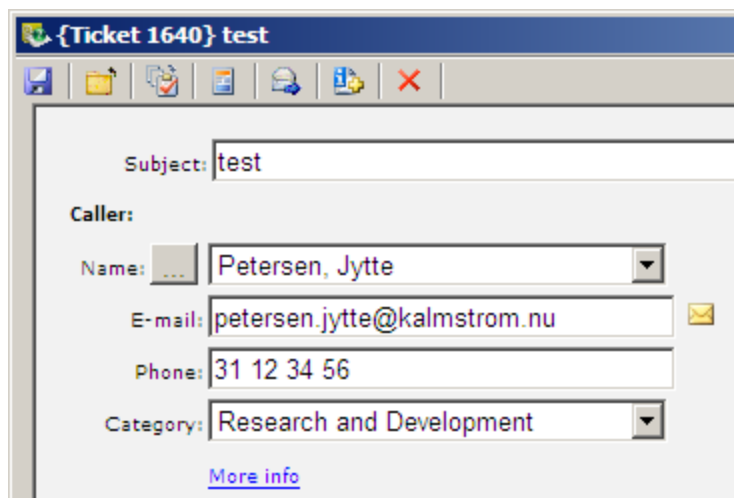
### 7.3 CALLER TAB

Information about the **people who call or e-mail the helpdesk** can be listed under Caller. This is useful when it is known what people would contact the helpdesk but the information about those people is neither stored in the Global Address Book nor in an Outlook Contact folder.

Check the option 'Auto-add new caller', under the tab Ticket form settings, and *PF HelpDesk* will automatically add a caller to the Callers list when a new ticket is created, if he or she is not already entered there.



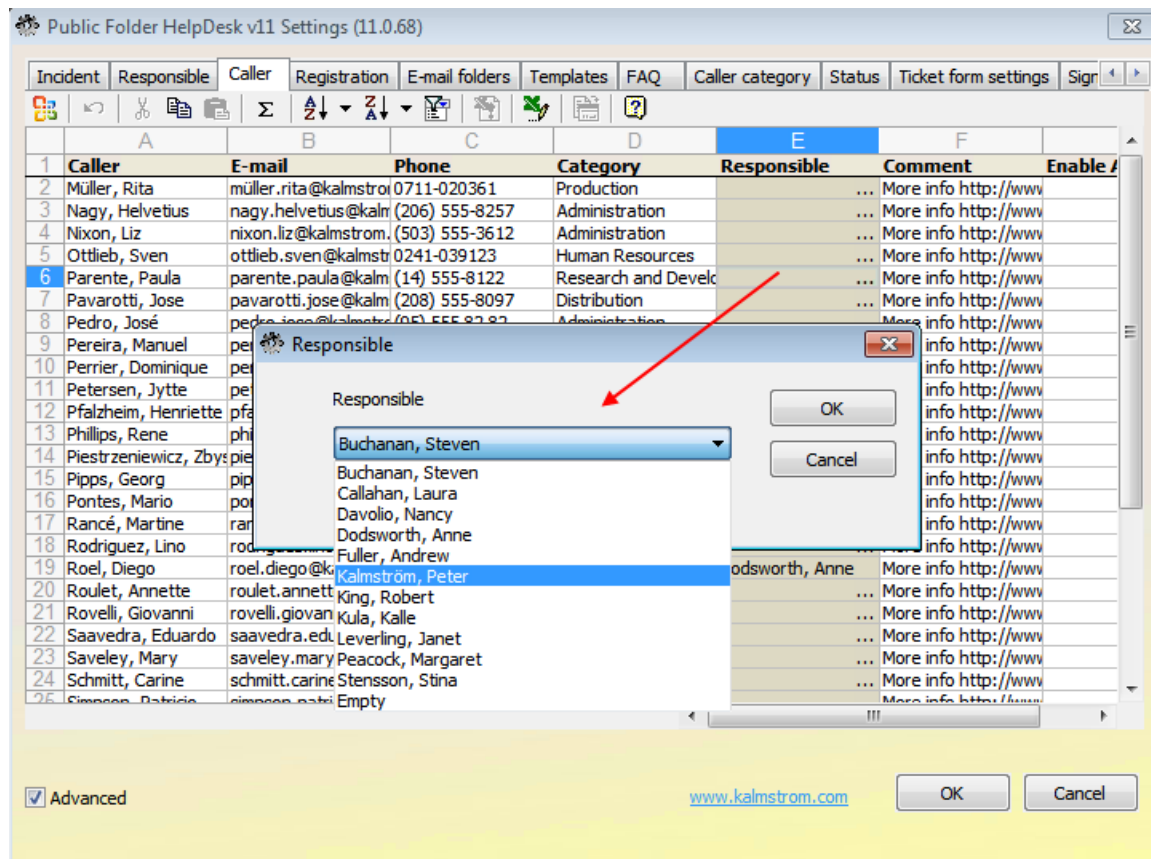
All the set information is **shown in the ticket** once the name is selected from the drop down list. The URL is clickable, so it can be reached from within the ticket.





### 7.3.1 Default responsible

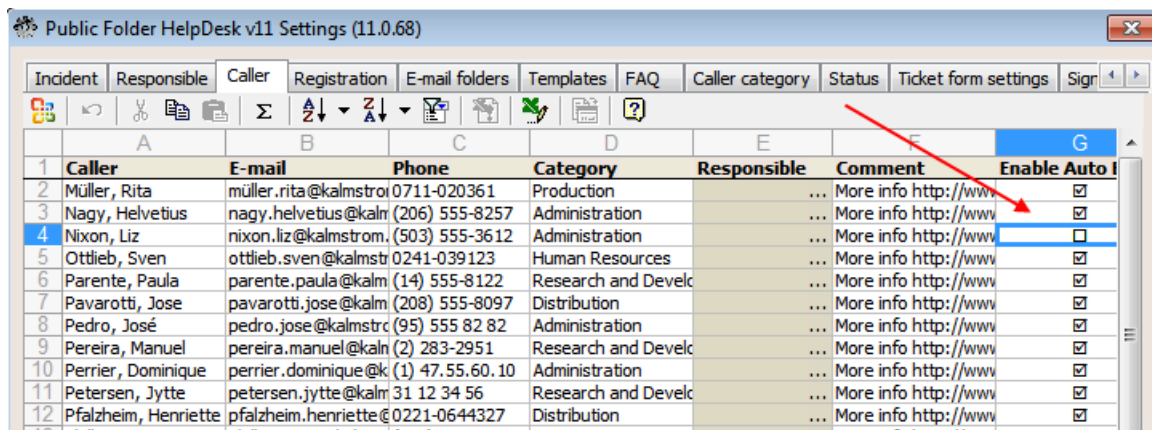
Under the Caller tab the admin can set one **default Responsible** for each caller. When an e-mail from that caller is converted, the name of the Responsible is automatically filled out in the ticket. (If no default Responsible is set, the Responsible person is selected manually from the dropdown in the ticket.) Click in the grey field and select a Responsible for the caller. That name will be automatically filled out in all tickets from that caller.



To **edit**, click in the default Responsible field again to select a different person. If you want to remove a default Responsible and not select another one, select the option Empty, or remove the default Responsible in the database, tblCallers.

### 7.3.2 Exclude caller from automatic e-mails

You can also choose what callers should not have an automatic e-mail when a ticket is created from their e-mails. By default all callers are checked, so **uncheck** the people you want to exclude from the sending list.



|    | A                    | B                     | C               | D                   | E           | F                        | G                                   |
|----|----------------------|-----------------------|-----------------|---------------------|-------------|--------------------------|-------------------------------------|
|    | Caller               | E-mail                | Phone           | Category            | Responsible | Comment                  | Enable Auto I                       |
| 1  | Müller, Rita         | müller.rita@kalmstroi | 0711-020361     | Production          |             | ... More info http://www | <input checked="" type="checkbox"/> |
| 2  | Nagy, Helvetius      | nagy.helvetius@kaln   | (206) 555-8257  | Administration      |             | ... More info http://www | <input checked="" type="checkbox"/> |
| 3  | Nixon, Liz           | nixon.liz@kalmstrom   | (503) 555-3612  | Administration      |             | ... More info http://www | <input type="checkbox"/>            |
| 4  | Ottlieb, Sven        | ottlieb.sven@kalmstr  | 0241-039123     | Human Resources     |             | ... More info http://www | <input checked="" type="checkbox"/> |
| 5  | Parente, Paula       | parente.paula@kalm    | (14) 555-8122   | Research and Develo |             | ... More info http://www | <input checked="" type="checkbox"/> |
| 6  | Pavarotti, Jose      | pavarotti.jose@kalm   | (208) 555-8097  | Distribution        |             | ... More info http://www | <input checked="" type="checkbox"/> |
| 7  | Pedro, José          | pedro.jose@kalmstrc   | (95) 555 82 82  | Administration      |             | ... More info http://www | <input checked="" type="checkbox"/> |
| 8  | Pereira, Manuel      | pereira.manuel@kaln   | (2) 283-2951    | Research and Develo |             | ... More info http://www | <input checked="" type="checkbox"/> |
| 9  | Perrier, Dominique   | perrier.dominique@k   | (1) 47.55.60.10 | Administration      |             | ... More info http://www | <input checked="" type="checkbox"/> |
| 10 | Petersen, Jytte      | petersen.jytte@kalm   | 31 12 34 56     | Research and Develo |             | ... More info http://www | <input checked="" type="checkbox"/> |
| 11 | Pfalzheim, Henriette | pfalzheim.henriette@  | 0221-0644327    | Distribution        |             | ... More info http://www | <input checked="" type="checkbox"/> |
| 12 |                      |                       |                 |                     |             |                          |                                     |

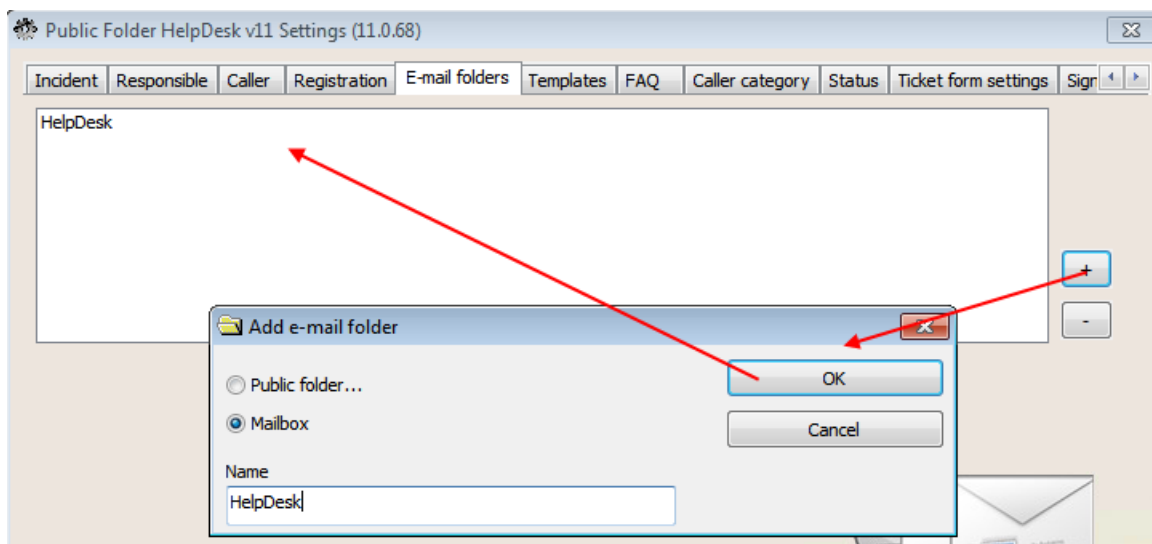
#### 7.4 REGISTRATION TAB

You have a full 30 days to try out all the functionality in *PF HelpDesk*. After that period you will be prompted to register. After registration you can continue working on the same data as before. No re-installation is needed. For details about registration, *refer to* Register.

#### 7.5 E-MAIL FOLDERS TAB

If you create a **special folder for incoming e-mail to the helpdesk**, you need to use the tab **E-mail folders** to set *PF HelpDesk* to **monitor** this folder. *PF HelpDesk* then automatically picks up all incoming e-mails to that folder and converts them into tickets. Click the plus sign to add a folder.

If you wish the folder to be a public folder, click OK and you are asked to select folder. For a mailbox the name of the folder must be written in.



A **copy** of the e-mail is saved to the received folder of a converted ticket (manual or auto conversion) when the option of "Save e-mails in subfolders " under the tab **Other Settings** is selected, *refer to* Other settings.

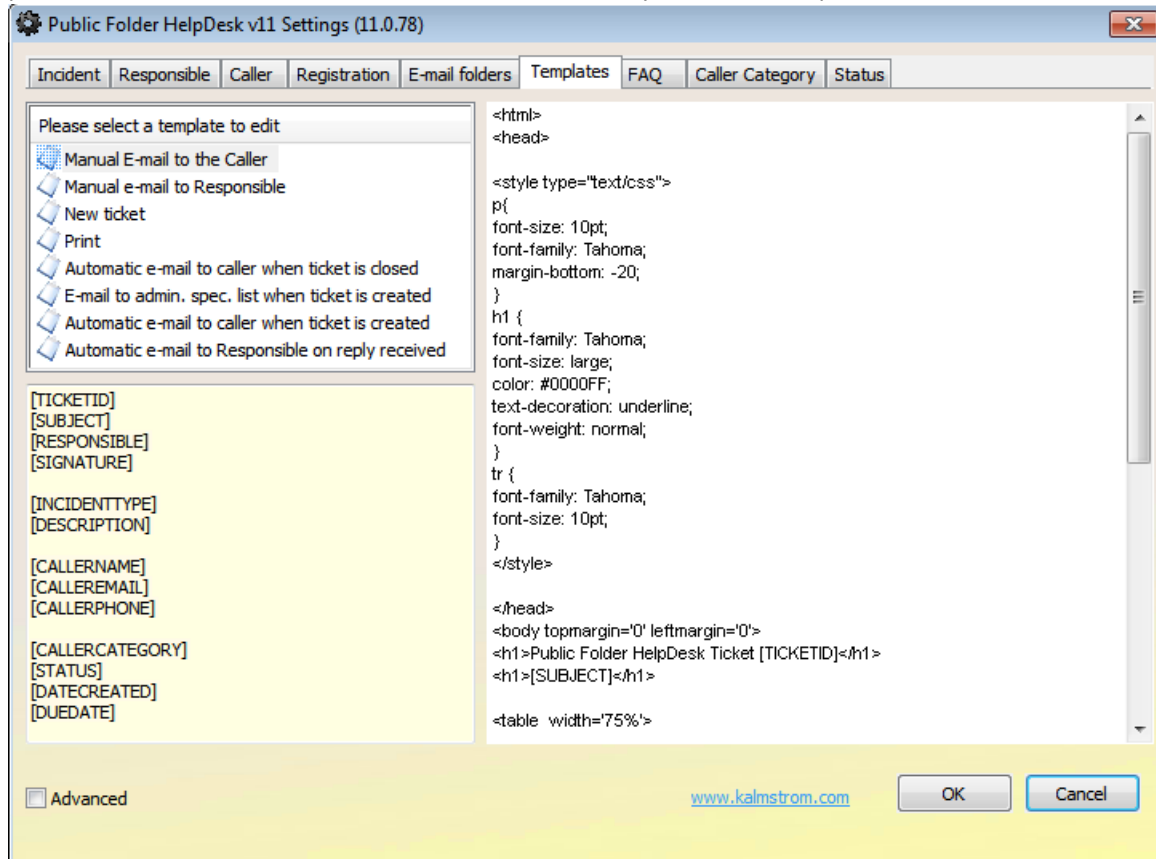
To automatically **notifying** callers when tickets are created from e-mails, fill out the template under the **Templates** tab, *refer to* Templates below.



## 7.6 TEMPLATES TAB

Under this tab you may **customize** how text should be displayed for certain messages and for new and printed tickets.

Under the list of templates you can see what **field info** may be included in each of the templates selected from the list. The "E-mail to caller" templates do not work without the [DESCRIPTION] placeholder variable, so this variable is made mandatory for those templates.



If you are not used to working with HTML code, you can copy and paste the code in any HTML editor. You can even use the mini editor under the FAQ tab in the *PF HelpDesk* Settings. Click the symbol to the right to get to the .html. Paste the template there and then make the changes you want in the editor. After that you can bring up the code again, by clicking on the HTML symbol. Copy it and paste it back into the template, and the e-mails should look as you want them.

If you want the default template back, just delete everything in the template, so that it is totally blank. Then click OK. Next time you enter the Settings the templates are filled with the default text again.

NOTE: The automatic e-mails are *not* sent out unless you add some text to the default template. When you have added the text the automatic e-mails are sent out until you remove the text again. This is easily done by emptying the template so that it is blank. For some of the notifications you don't even have to empty the template but just uncheck the corresponding box under the Other Settings tab, refer to E-mail notifications.



#### 7.6.1 Manual e-mail to the caller

When a ticket is created an e-mail to the caller can be sent manually by clicking the button to the right of the caller's e-mail address in the ticket. When you click the button the e-mail is displayed. You may change it if you wish, and then you send it manually.



#### 7.6.2 Manual e-mail to the responsible

The e-mail to the responsible person can be sent manually by clicking the button to the right of the responsible person's e-mail address in the ticket.



#### 7.6.3 New ticket

The New template gives the administrator of the *PF HelpDesk* system a possibility to customize what the **body of a new ticket** should contain. The default is the headings Incident and Solution, but if that does not suit you, you can modify the html. NOTE that you should keep the tag [BODY] in the html. When an e-mail is converted into a ticket, the body of the e-mail will be inserted where the [BODY] tag is.

#### 7.6.4 Print

The Print template has .html-code for printing tickets.

#### 7.6.5 Automatic e-mail to caller when ticket is closed

When a case is closed an e-mail will be automatically sent out to the caller if:

- some text is added to this template
- the appropriate checkbox under the tab **Other Settings** is checked, *refer to* E-mail notifications E-mail to caller when ticket is closed.

#### 7.6.6 E-mail to admin. spec. list when ticket is created

When some text is added to this template, an e-mail will be automatically sent to the people defined under the **Other Settings** tab, *refer to* E-mail notification when ticket is created.

#### 7.6.7 Automatic e-mail to caller when ticket is created

When some text is added to this template, an e-mail will be automatically sent to the caller when a new ticket is created.

This feature works for **all** tickets: when tickets are created from e-mails, both automatically and manually and also if the ticket is created using the New button – provided an e-mail address is entered into the ticket, of course. It also works when tickets are created from the web form.

This template is empty from the beginning, so you have to add some html code and text. Here is a suggestion on what you can put in the empty template:

```
<html>
<head>
<style type="text/css">
p {
font-size: 10pt;
font-family: Tahoma;
```



```
margin-bottom: -20;
}
h1 {
font-family: Tahoma;
font-size: large;
color: #0000FF;
text-decoration: underline;
font-weight: normal;
}
</style>
</head>
<body topmargin='0' leftmargin='0'>
<h1>Ticket Alloted</h1>
</p>Thank you for contacting us. A new ticket [TICKETID] bearing the subject '
[SUBJECT]' has been created in our helpdesk, and you will soon be contacted by one
of our staff.</p>
</p>&nbsp;</p>
<h1>Your query was:</h1>
<p>[DESCRIPTION]</p>
</p>&nbsp;</p>
</body>
</html>
```

#### 7.6.8 Automatic e-mail to Responsible on reply received

This template may be used when e-mail history is saved in the ticket body or in subfolders, refer to E-mail history. When some text is added to the template, an e-mail will be automatically sent to the responsible helpdesk staff when an e-mail reply from the caller is added to a ticket, or when a new e-mail is added to a ticket. The responsible can then open the ticket by simply selecting the notification e-mail and press the Open Ticket button in the Outlook toolbar.

Note that the checkbox "Automatic e-mail to Responsible on reply received" under the Other Settings tab must be checked also. It's checked by default.

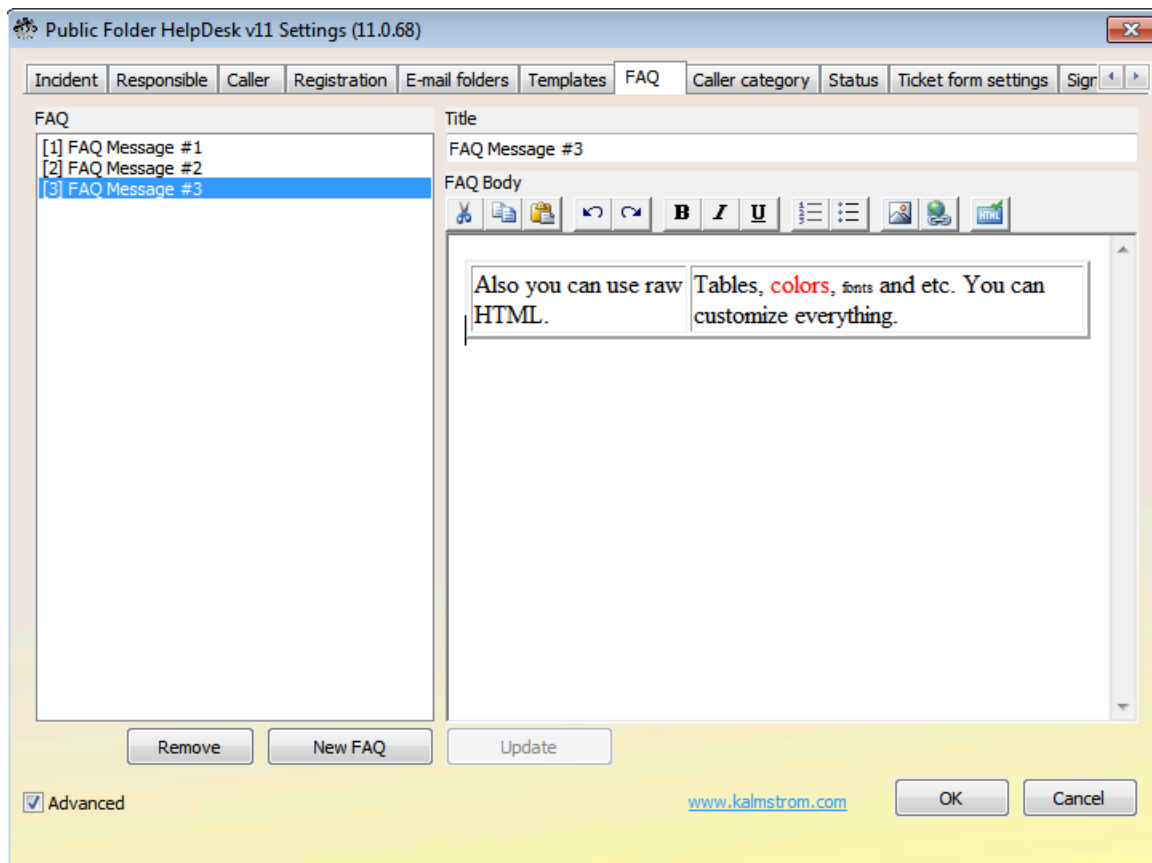
In Outlook 2007, when a new e-mail reply is added to the ticket, the ticket is also red-flagged and appears unread.

### 7.7 FAQ TAB

The FAQ editor gives you a possibility to create **standard answers**. The selected FAQ is inserted in the e-mail you send manually to the caller. We use the "Manual e-mail to the caller" template for this purpose, and the FAQ is added to the [DESCRIPTION] variable. Also *refer to* Manual e-mail to the caller.

Click the FAQ Reply button in the ticket Toolbar Strip to include a FAQ in your answer to the caller.





Three example messages have been included in the list to show what the editor can do. Replace them with your own and create more. This makes the work easier for the support staff and also ensures that messages that are sent often have the best possible content.

Summary:

To create the FAQ:

1. Go to the FAQ tab under Settings
2. Click the button New FAQ
3. Write a title for the FAQ
4. Enter the text and images you wish to use in the HTML editor
5. Click the button Add to DB
6. Click OK
7. (You can check in the database, in the tblTemplateMessages, that the new FAQ is really there)

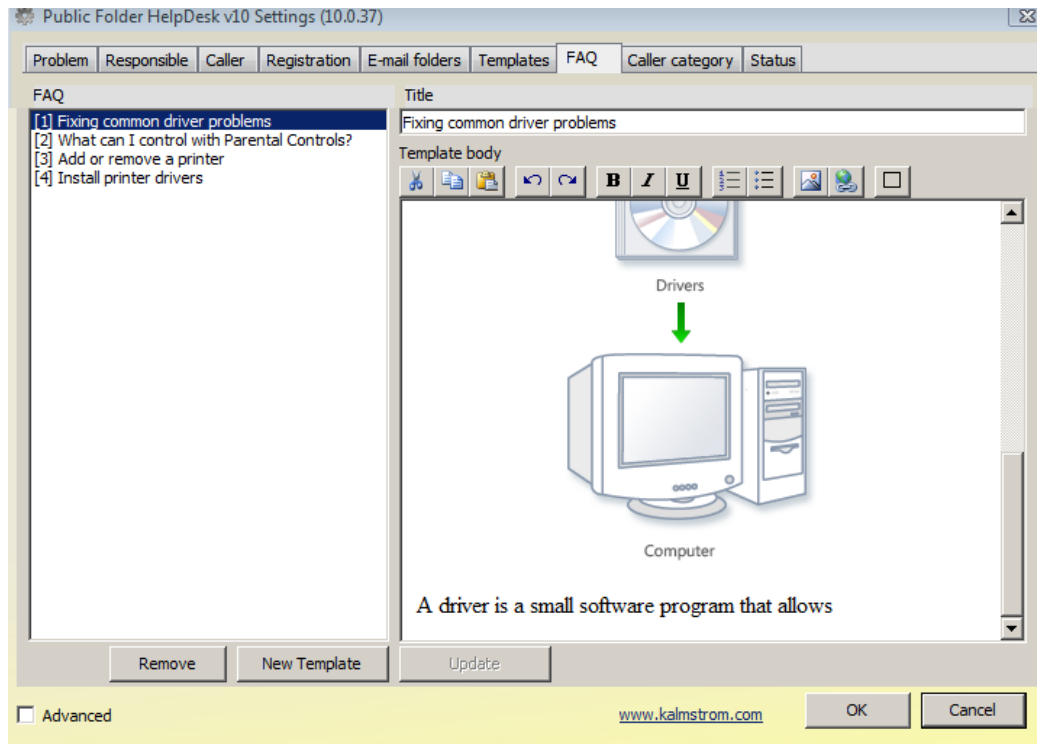
To send the FAQ:

1. Create a ticket with the new button or manual conversion - or open an automatically converted ticket.
2. Click the FAQ answer button, to open the FAQ list dialog.
3. Select the FAQ you want to add.
4. Click insert.
5. Now a new e-mail is opened automatically, with the FAQ inserted.
6. Send the e-mail manually.

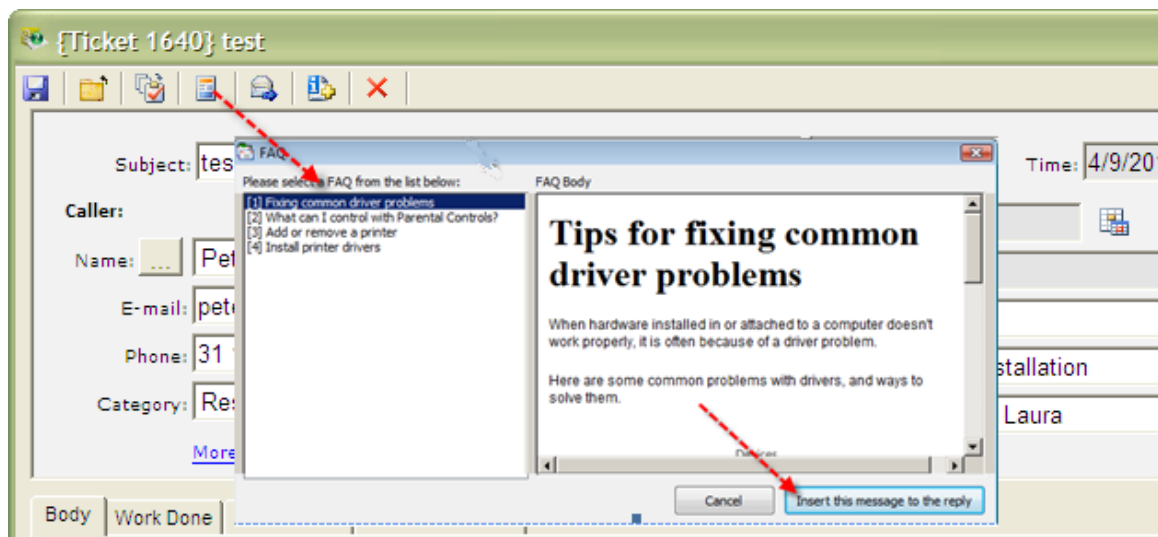


Here is an example of how it might look:

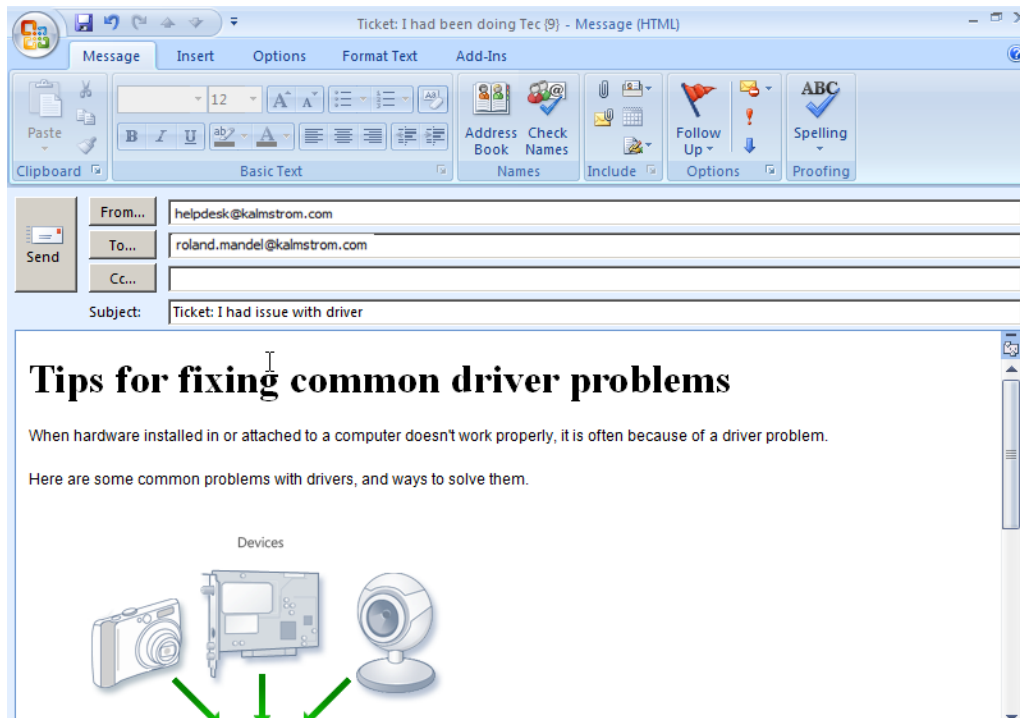
The FAQ in the editor might look like this:



The ticket button has been clicked, and the list of standard answers comes up



If the support worker selects to insert the FAQ reply, the e-mail to the caller will look like this



## 7.8 CALLER CATEGORY TAB

Under the tab Caller category the administrator can define different **categories to describe the callers**. These categories are then used in the ticket and in the statistics.

## 7.9 STATUS TAB

Under the tab Status the administrator can define different status categories to be used in the tickets and in the statistics.

## 7.10 TICKET FORM SETTINGS TAB

The **ticket fields can be customized** – refer to Customize the Ticket HTML Form– and the data in the customized fields can be **saved** to the database. When a ticket field has been added, or a customized field has been changed, it will be automatically shown in the Custom fields list under the tab Ticket form settings. Select it and click Apply, and the data entered in this field will be treated like data entered in the default fields - saved to the database and possible to use in the statistics tool.

If non-existent values have been added in the fields, the administrator can define under this tab what should be done with them - should they be saved to the PF HelpDesk Settings automatically, after a question or not at all?



PFHelpDesk V11 Configure (11.3.6)

Incident Responsible Caller Registration E-mail folders Templates FAQ Caller Category Status Ticket form settings Sign

**Custom Fields**  
Save the following checked custom fields (introduced in the PF HelpDesk ticket form) to the database

Custom fields list:  
☒ companyname

Apply

**Non-existent values in the ticket form**  
Should PF HelpDesk automatically save non-existent values for the following drop-down list in the ticket form?

|                 |                                      |                           |                          |
|-----------------|--------------------------------------|---------------------------|--------------------------|
| Incident Type   | <input checked="" type="radio"/> Ask | <input type="radio"/> Yes | <input type="radio"/> No |
| Responsible     | <input checked="" type="radio"/> Ask | <input type="radio"/> Yes | <input type="radio"/> No |
| Status          | <input checked="" type="radio"/> Ask | <input type="radio"/> Yes | <input type="radio"/> No |
| Caller Category | <input checked="" type="radio"/> Ask | <input type="radio"/> Yes | <input type="radio"/> No |

**Default value**  
☐ Assign default minutes to a closing ticket if Minutes worked field is empty Value

☐ Auto-add new caller

☐ Do not include attachments in e-mails to callers.



Public Folder HelpDesk for Outlook®  
**kalmstrom.com**  
Business Solutions

☒ Advanced

[www.kalmstrom.com](http://www.kalmstrom.com) OK Cancel

Under the Ticket form settings tab, a **default value for minutes worked** can be set for **all** cases. This value is used if the Minutes worked are *not* set by the Responsible under the Work Done Tab when the ticket is closed and if the Minutes worked is not set under the Incident tab. (If the checkbox is not checked and the minutes for the specified Incident are not set, the user will be required to add the number of minutes worked before it is possible to close the ticket.)

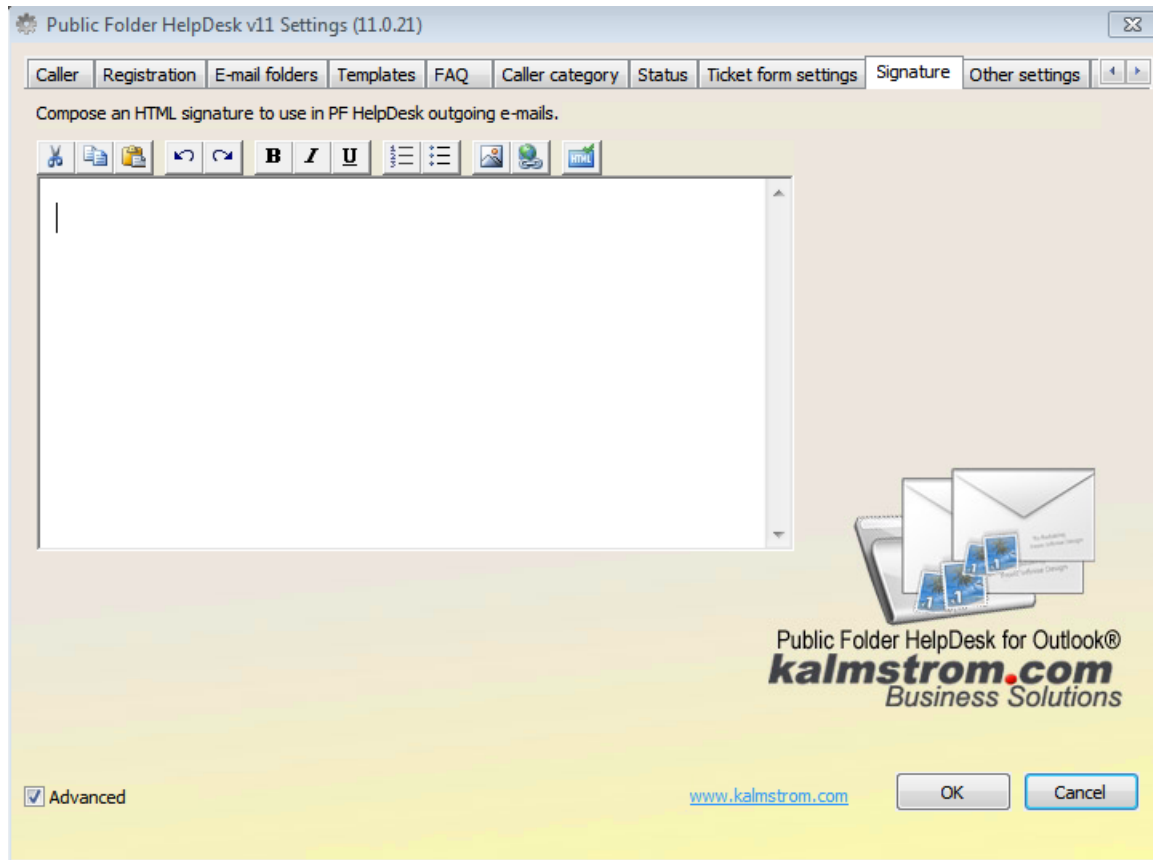
If the checkbox for **Auto-add new caller** is checked and an e-mail from a caller who is not represented in the Callers list is converted to a ticket, this caller's name and e-mail address is automatically saved to the database. This works for both manual and automatic conversion.

If you do **not want to include attachments** in your answers to callers, check the box for that.



## 7.11 SIGNATURE TAB

Under this tab a signature for e-mails sent from *PF HelpDesk* can be created in a WYSIWYG .html editor. We recommend that you use this signature instead of the Outlook signature.





## 7.12 OTHER SETTINGS TAB

The other settings tab has a number of functions:

The screenshot shows the 'Public Folder HelpDesk v11 Settings (11.0.21)' dialog box with the 'Other settings' tab selected. The tabs include: Caller, Registration, E-mail folders, Templates, FAQ, Caller category, Status, Ticket form settings, Signature, and Other settings. The 'Other settings' tab contains the following sections:

- Send e-mail from:** A text input field for the email address.
- Service hours:** Includes 'From' (Monday) and 'To' (Friday) dropdowns, and 'Service hours' (8:00:00 AM - 5:00:00 PM) and 'Lunch break' (12:00:00 PM - 1:00:00 PM) time ranges with checkboxes.
- E-mail history:** Checkboxes for 'Save e-mail history in ticket body' and 'Save e-mail in subfolders'.
- Automatic Notification Settings:** Checkboxes for 'Send email to caller when ticket is closed', 'Automatic e-mail to Responsible on reply received' (checked), and 'Send email to these users/this distribution list when a new ticket is created:' (with a list box and a 'Pick from Address Book...' button).
- KBase for Outlook:** A text input field with a URL (www.kalmstrom.com/products/Outlook/KBase/), a browse button (...), and a 'Reset' button.
- Path to HelpDesk Online Form:** A text input field with a placeholder URL (e.g. http://www.myDomain.com/helpdesk), an 'Enable Automatic Tracking' checkbox, and a dropdown menu set to '1 Minute'.

At the bottom, there is a 'Advanced' checkbox (checked), a 'www.kalmstrom.com' link, and 'OK' and 'Cancel' buttons.

### 7.12.1 Send e-mail from

By default e-mails which are sent from a ticket to the Caller or Responsible are sent as from the senders personal e-mail account. If you want to change that, specify an **e-mail address for the e-mails sent from PF HelpDesk**. You will need to **configure Exchange** to allow all staff sending messages from *PF HelpDesk* to send e-mails from an email address other than their personal one.

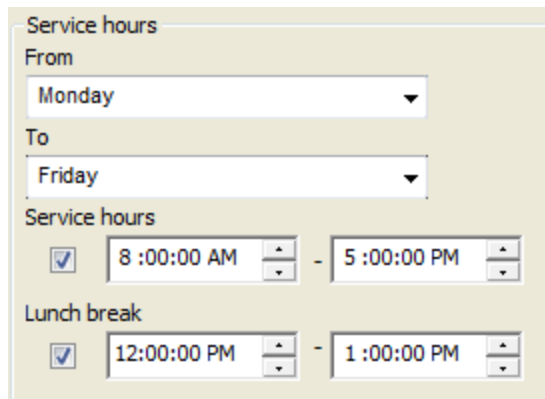
Send e-mail from  
helpdesk@kalmstrom.com

### 7.12.2 Service hours

The information about service hours (e.g. the helpdesk's opening hours) is needed for the statistics.

When a ticket is closed the system calculates how long it was open, and if the opening hours are set, it only counts time when the staff of the helpdesk was actually working.

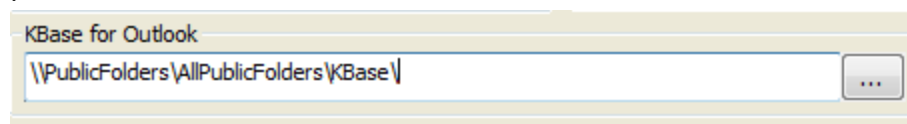
In the example to the right, a ticket opened at 4.50 PM on Friday afternoon and closed at 8.10 on Monday will only be counted as being opened 20 minutes – not as the whole weekend.



The 'Service hours' window shows settings for ticket tracking. It includes dropdowns for 'From' (Monday) and 'To' (Friday). Below these are two rows of time selection: 'Service hours' from 8:00:00 AM to 5:00:00 PM, and 'Lunch break' from 12:00:00 PM to 1:00:00 PM. Each row has a checked checkbox on the left and up/down arrows on the time fields.

### 7.12.3 KBase path

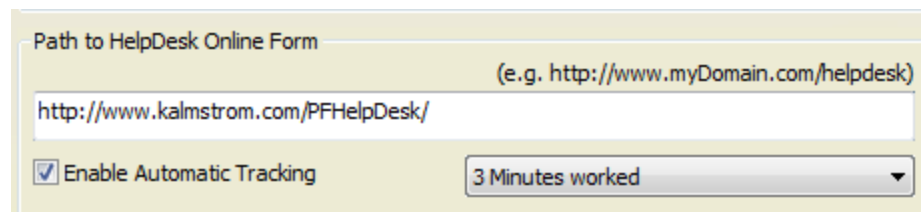
The path to the free knowledge base application, *KBase*, must be given under Other Settings too, so that tickets with interesting problems and solutions can be converted into *KBase* articles. For more info, refer to *KBase*.



The 'KBase for Outlook' window shows a text field containing the path '\\PublicFolders\\AllPublicFolders\\KBase\\'. To the right of the field is a button with three dots.

### 7.12.4 Enable Automatic Tracking

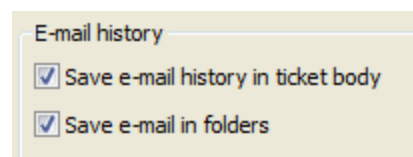
This checkbox is for the **web form**. If it is checked, *PF HelpDesk* will fetch tickets from the web form at the specified intervals.



The 'Path to HelpDesk Online Form' window shows a text field with the URL 'http://www.kalmstrom.com/PFHelpDesk/'. To the right of the field is a note '(e.g. http://www.myDomain.com/helpdesk)'. Below the field is a checked checkbox labeled 'Enable Automatic Tracking' and a dropdown menu showing '3 Minutes worked'.

### 7.12.5 E-mail history

There are two ways of **saving associated e-mails to a ticket**, in **subfolders** and in the **ticket body** field. Either one of these *or both* features can be enabled.



The 'E-mail history' window shows two checked checkboxes: 'Save e-mail history in ticket body' and 'Save e-mail in folders'.

*By default* none of the boxes are enabled, and a new ticket is created each time an e-mail is converted. We recommend you to use the e-mail history feature, though, since it gives you a much better overview of issues.

#### 7.12.5.1 Save e-mails in ticket body

If the box Save e-mails in ticket body is checked, all e-mails concerning the same case are added to the ticket. **Sent/Received emails will be integrated within the ticket body in chronological order.** Redundant forward chunks of the e-mails are removed through an intelligent algorithm, and



only the required and latest replies are added to the body portion along with the HTML formatting and with a header portion that includes when the e-mail was received, from whom etc. Attachments from each e-mail are attached to the ticket itself and each attachment name is embedded to the relevant part of the e-mail. An e-mail thread in a ticket could look like this:

 test.xls (19 KB);  Screen.bmp (4 MB)

---

Note added  
From:Administrator  
Date:2/19/2009

---

Remote session helped, please close ticket

---

Note added  
From:Saurabh verma  
Date:2/19/2009

---

Did remote session with Admin

Message received  
From:Administrator  
To:Saurabh verma  
Subject:RE: Ticket: Help with setting up New account {3}  
Date:2/19/2009

---

Hello Saurabh,

Thanks for the screen shot,

I tried but it didn't help much – next option

Regards

Admin



---

Message sent

To: Administrator

Subject: Ticket: Help with setting up New account {3}

Date: 2/19/2009

---

Hello Admin,

I am sending you screen shot how can we setup new users, Please find attachment

Regards

Saurabh

Attachment: Screen.bmp

---

Original message

From:

Subject: Help with setting up New account

Date: 2/19/2009

---

#### **Incident**

Hello Saurabh,

Please help me with setting up new user in exchange,

I tried from my side but could not get any help.

I am sending you list of all users who need to be added in exchange, please find the attachment

Regards

Admin



#### 7.12.5.2 Save e-mails in subfolders

If you want to save connected e-mails in special *PF HelpDesk* subfolders, check this checkbox. Then **subfolders with the ticket id number will be created automatically** under the *PF HelpDesk* folder in Outlook, and all the e-mails connected to the same ticket id will be saved in the same subfolder.

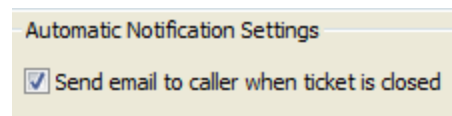
In the ticket there will be two new tabs, Sent E-mails and Received E-mails, from where the e-mails may be opened. *Refer to Tab Strip.*

If you use this method to track e-mails you will eventually have a lot of subfolders. Remove subfolders for closed tickets by running the file **PFHDCleanSubfolders.exe** in the *PF HelpDesk* directory on the server.

#### 7.12.6 E-mail notifications

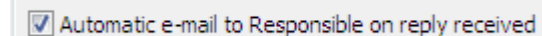
##### 7.12.6.1 E-mail to caller when ticket is closed

When a ticket is closed, an e-mail can be sent to the caller automatically confirming that the case is resolved. Enabled this feature by checking the first box under **Automatic Notification Settings**.



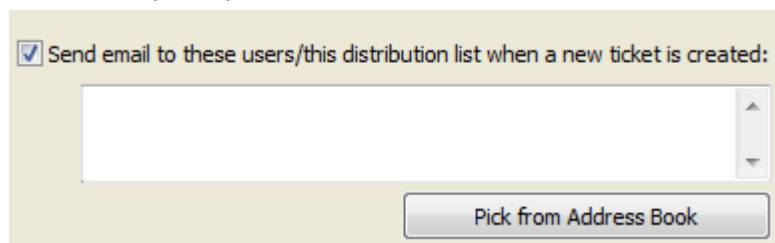
##### 7.12.6.2 E-mail to Responsible on reply received

If this box is checked, an alert is automatically sent to the responsible staff when an e-mail reply from the caller is received to the helpdesk. This option works only if at least one of the checkboxes 'Save e-mails in subfolders' or 'Save e-mails in ticket body' is enabled. Note that the corresponding template under the Templates tab, Automatic e-mail to Responsible on reply received, must be filled out with some text for the e-mail to be sent.



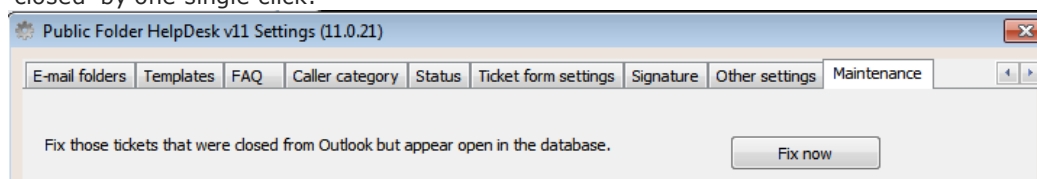
##### 7.12.6.3 E-mail notification when ticket is created

If you need an e-mail to be sent automatically to a person or distribution list each time a new ticket is created, check this box under **Automatic Notification Settings** and define the e-mail addresses. You can also pick the addresses from the Address Book. If there are multiple e-mail addresses, each of them should be separated using the semicolon (;).



#### 7.13 MAINTENANCE TAB

The last tab is for maintenance of *PF HelpDesk* and has a button for fixing tickets in the database which are set to 'open', but don't have a corresponding Outlook ticket. All such tickets can be set to 'closed' by one single click.



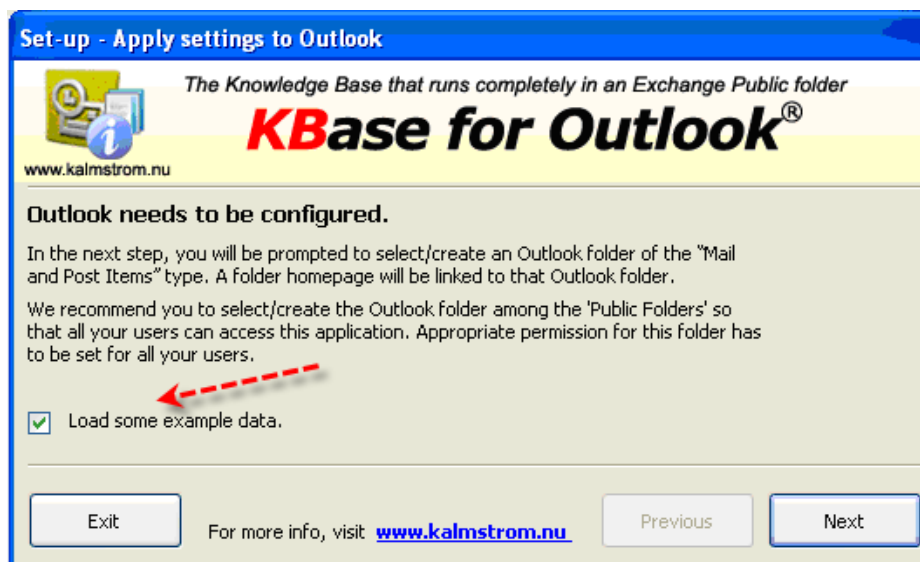
## 8 KBase

The knowledge base *KBase* is very helpful when used together with *PF HelpDesk*. When you feel that a solution to a problem should be saved into the knowledge base, do this **by clicking the *KBase* button before closing the ticket**. The tickets in the *KBase* can be full text searched, and users can also add information in them, for example if they have a better solution to a problem. If the ticket has attached folders they are automatically saved into the *KBase*, but attachments may also be added later.

The application can be downloaded from <http://www.kalmstrom.com/products/Outlook/KBase/Download/>. A license for *KBase* is included in the purchase of *PF HelpDesk*.

*KBase* is installed in the same simple way as *PF HelpDesk*. Just click the **KBaseSetup.exe** file and follow the instructions.

If you want to familiarize yourself with *KBase*, you can make use of the possibility of creating example data. This possibility is offered when the installation is over and Outlook needs to be configured. If you check the example data checkbox, you are presented with the kalmstrom.com Business Solutions' FAQ-articles.



Remember setting the path to the *KBase* in *PF HelpDesk* Settings, Other settings tab. Refer to *KBase* path.

The articles can be saved as web pages, see example at <http://www.kalmstrom.com/FAQ/>. For more information about *KBase*, refer to the *KBase* manual, downloadable from <http://www.kalmstrom.com/products/Outlook/KBase/>. At the *KBase* home site you will also find video demonstrations and a slideshow.

## 9 UPGRADE PUBLIC FOLDER HELPDESK

Our products are continually improved and updated, and if you have a problem with your *PF HelpDesk* it might help to download the latest version from our website and make an upgrade. New



features are also added, so even if your *PF HelpDesk* works smoothly we recommend frequent upgrades. Please follow the development at the *PF HelpDesk* Revisions page at [www.kalmstrom.com](http://www.kalmstrom.com). **Community Members may upgrade without cost as many times as they wish.**

## 9.1 PERMISSIONS FOR UPGRADE

The upgrade must be performed by a person who has **Write** permission over the *PF HelpDesk* server folder and is **Owner** of the public folder/mailbox.

## 9.2 UPGRADE PROCESS

Make sure that no application of your existing *PF HelpDesk* is running during the upgrade. Please follow these steps:

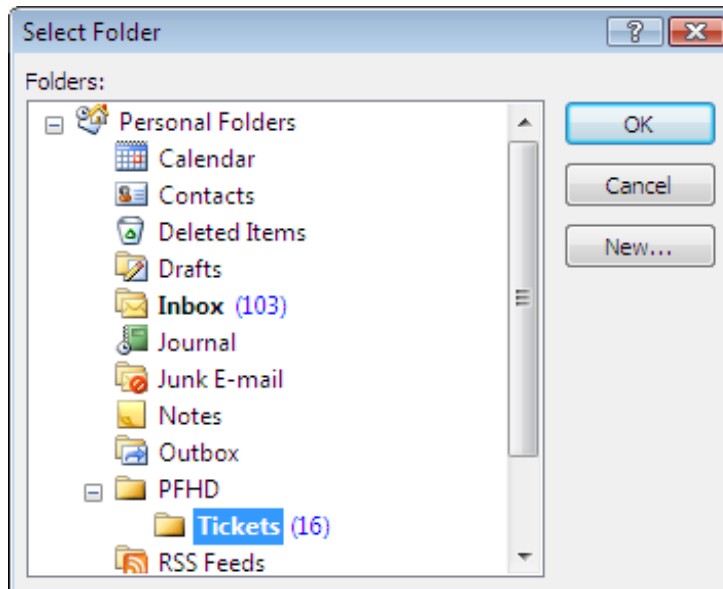
1. **Save** the installation file **PFHelpDeskSetup.exe** to your computer and then to the *PF HelpDesk* root file folder on your server.
2. **From a client** that has access to the *PF HelpDesk* network folder, run the newly downloaded Setup file and accept the License Agreement.
3. In the Installation Type dialog, select 'Upgrade/Repair existing Public Folder HelpDesk' and click Next.



4. You are now asked to select a *PF HelpDesk* Outlook folder. With that info the installer finds the path to the central installation and upgrades the files that have been changed since the latest upgrade. Also the client tools are upgraded on the machine from which the upgrade is made. On the other machines with *PF HelpDesk* installed there will come a prompt to upgrade, see below.

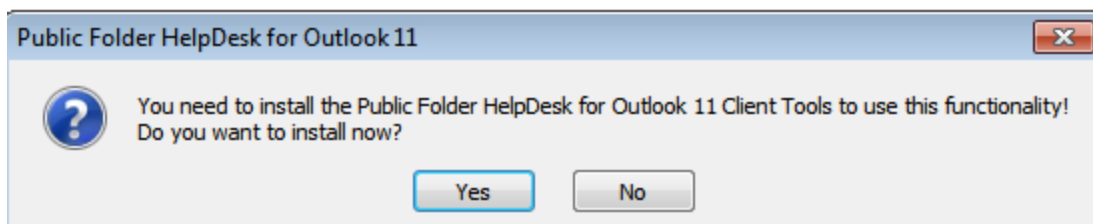


4. Specify the Outlook folder of your existing *PF HelpDesk* installation.



If you have multiple installations, repeat the process for each Outlook folder.

The **PF HelpDesk Client Tools** are not changed so often, but if they have been changed since last update the upgrade will be automatic and silent on the installation/upgrade machine. The other users must also upgrade their client tools, and they will then be prompted to do so the first time *PF HelpDesk* is started after the upgrade.





If a client answers No by mistake or is not prompted to install the Client Tools, run the file **PFHelpDeskClientTools.exe** in the *PF HelpDesk* root file folder to upgrade the client tools manually.

#### 9.2.1.1 Upgrading the web form

If you have been using the web form and wish to continue doing it, you will need to update it manually:

When you have upgraded *PF HelpDesk*, replace your earlier *PF HelpDesk* online files with the content in the new PFHDOOnline folder (in the *PF HelpDesk* network folder). After that, resave the run the *PF HelpDesk* Settings and click OK to resave them. That will create the file **Categories.xml** again.

#### 9.2.1.2 Customized ticket form

If you earlier have customized your ticket form, please create an HTML tag with the ID of the old customized field in the new ticket form, refer to Customize the Ticket HTML Form. Your old ticket form will be removed during the upgrade.

## 10 STATISTICS

### 10.1 OVERVIEW

The statistics of *PF HelpDesk* are very useful for a manager who wants to **analyze** what kind of problems are reported, how problem solving time is distributed, what problems different staff has been working with, etc. The statistics are based on the *OLAP Reporting Tool*, an application which in different forms is used in several products from kalmstrom.com Business Solutions. For more information about the *OLAP Reporting Tool*, refer to <http://www.kalmstrom.com/products/Excel/OLAPReporting/>.



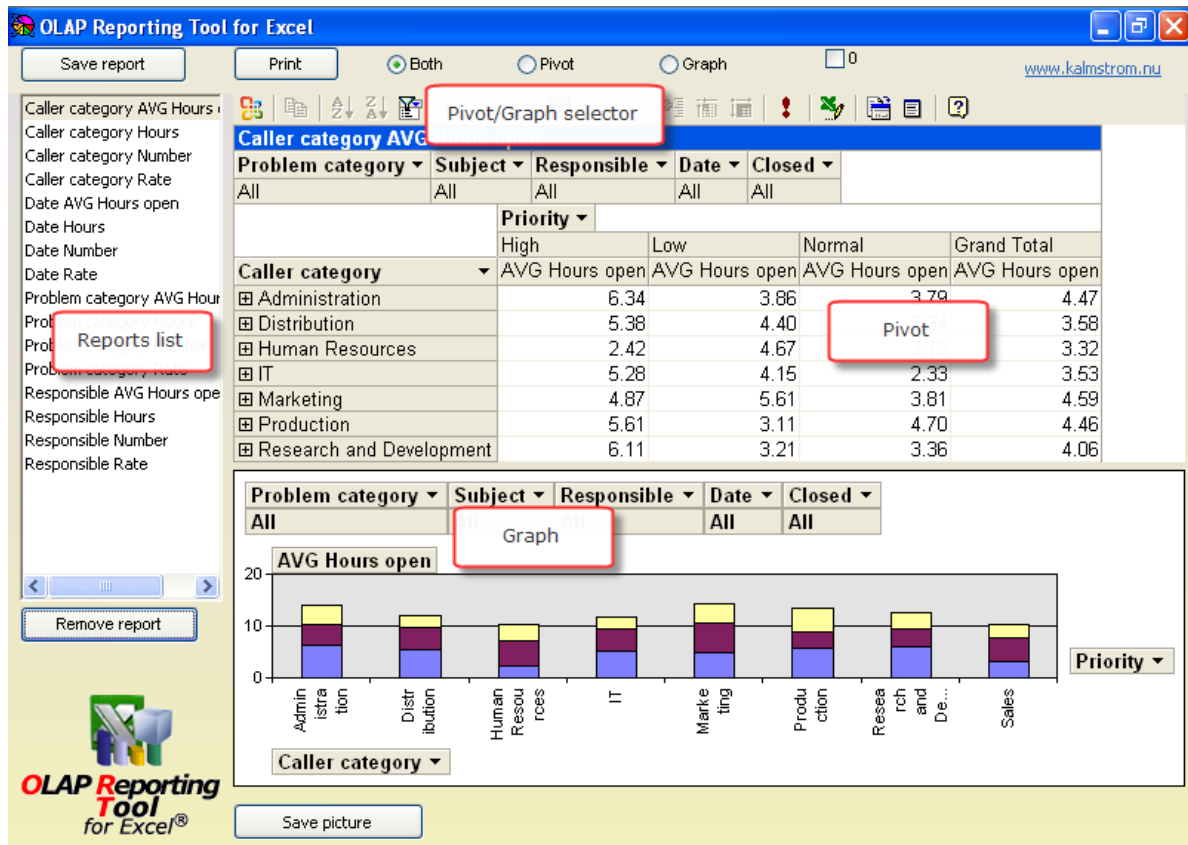
The statistics are reached through the button on the right side of the *PF HelpDesk* home page.

Below the most common features are described, but the *OLAP Reporting Tool* also has its own manual and on-line demonstrations. Please refer to our website for much more information about how to use and customize this tool.

The interface of the statistics home page has three parts:

- The **reports list** to the left, with a number of predefined reports – different ways of studying the data – arranged alphabetically. There are 16 standard reports by default, but you may modify them or create your own and remove the default reports.
- The **pivot** section.
- The **graph** section.

The two last parts can be shown together or one at a time.



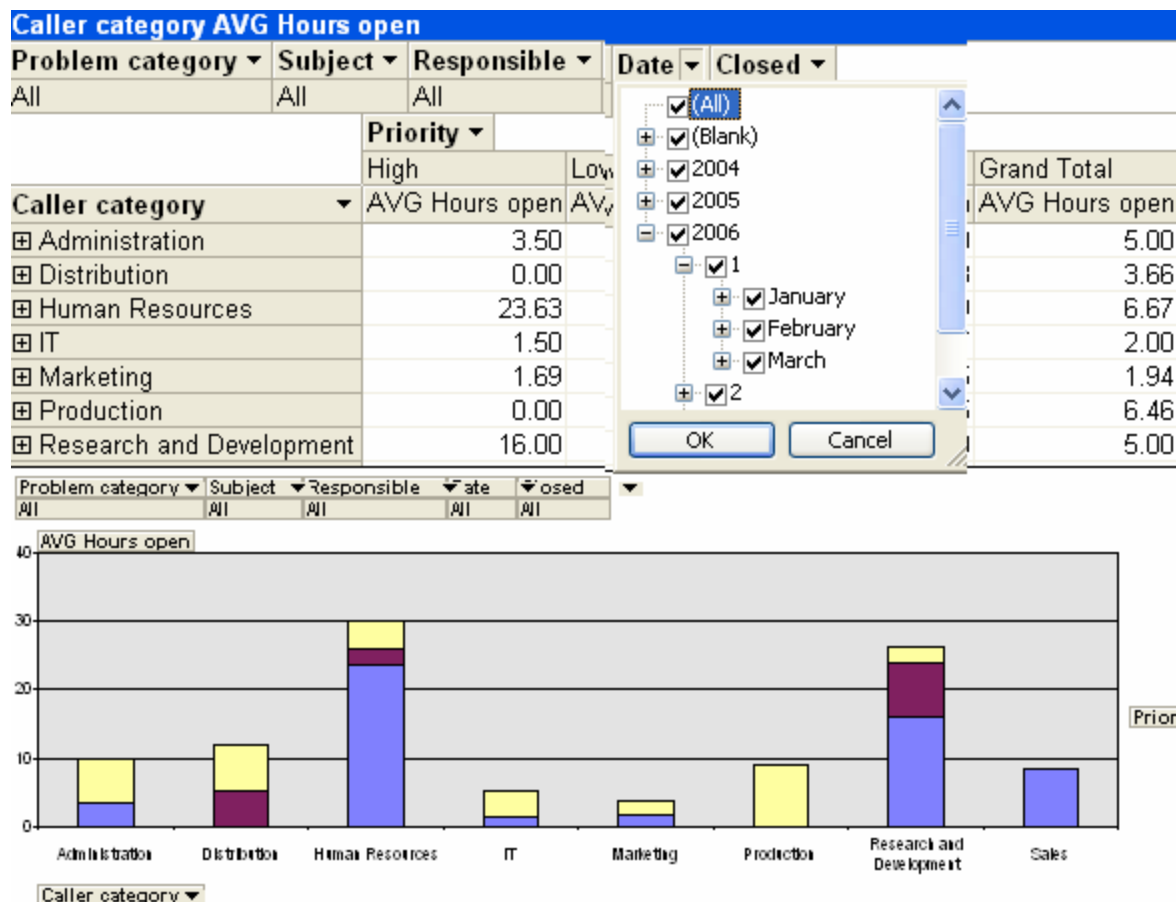
## 10.2 EXCEL

All data can be **exported to Excel** and treated like other information in an Excel data sheet. Unfortunately Microsoft has changed Excel 2007 in a way that makes this impossible if you use Office 2007.

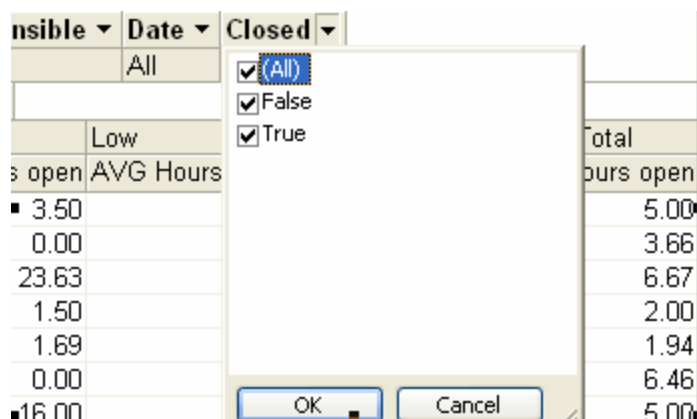


## 10.3 REPORT CUSTOMIZATION

Both the pivot tables and the graphs can be changed to **show only exactly what you are interested in**. All fields with a small triangle pointing downwards have a **filtering** tool, like *Years* in the *Date* field in the picture below. All fields with a plus sign have a **drill** tool. If you click the plus you can see more details, like the year 2006 and the first quarter of that year. In the graph you drill into and filter by right clicking.

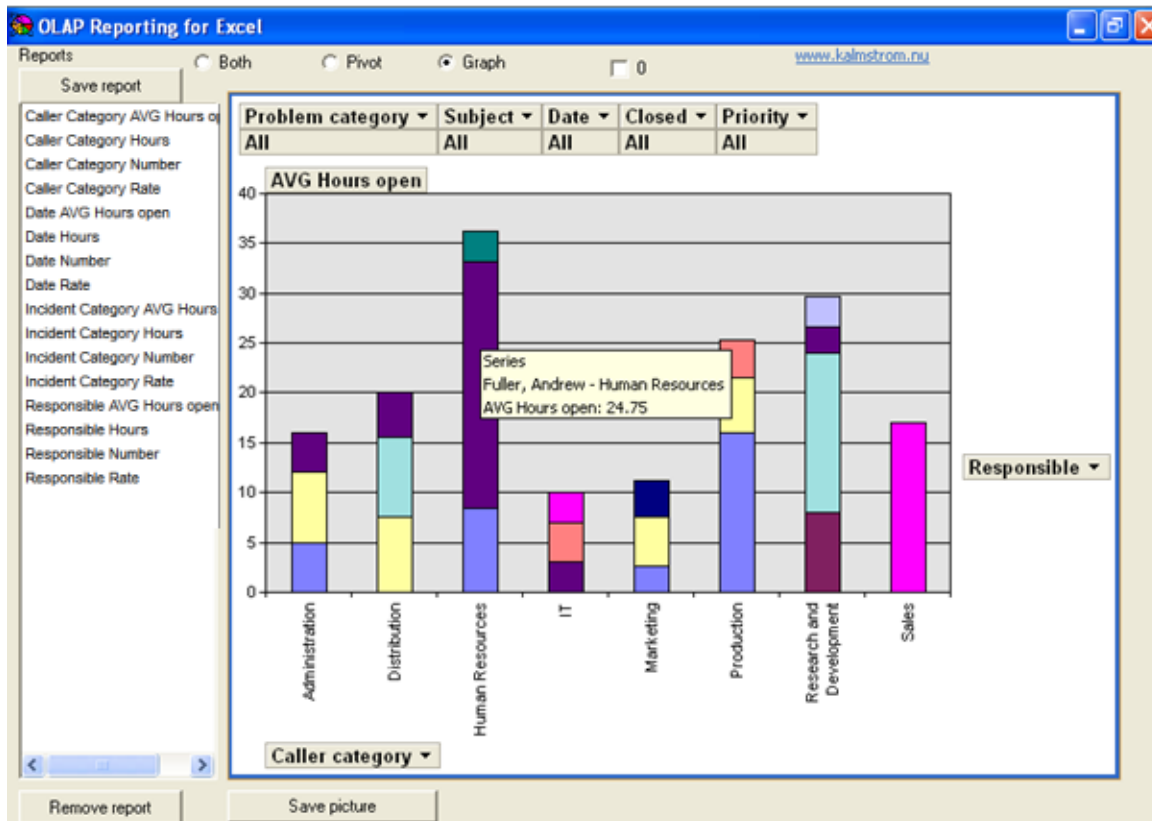


In the *Closed* field you can choose to see data from all tickets, or from only closed or only open tickets.  
**False = not closed (= Open).**  
**True = Closed.**



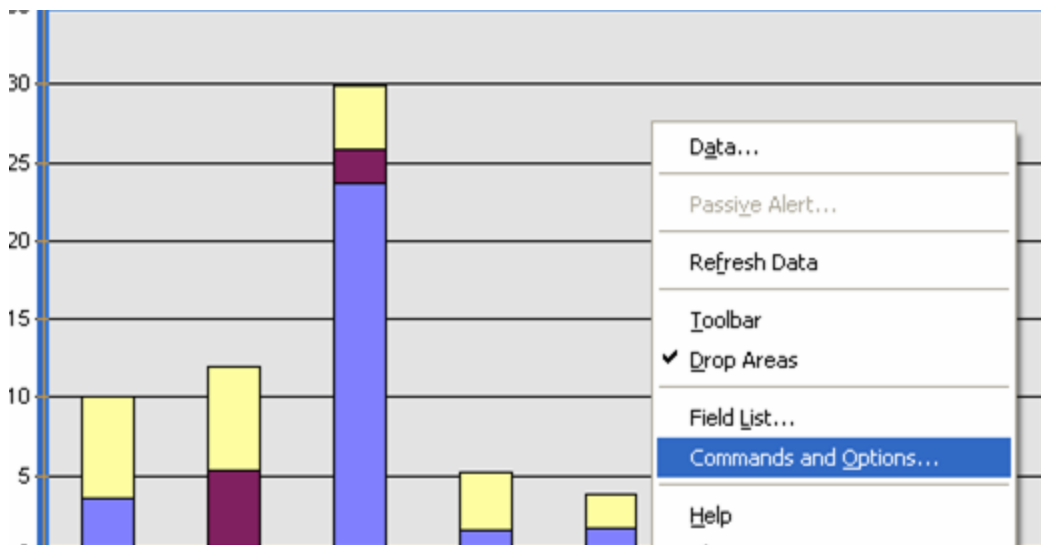
All fields in both the pivot and the graph can be **dragged and dropped**, which makes it possible for you to see the data in different ways. The fields can only be placed at certain positions in the table or chart, but the *OLAP Reporting Tool* will not allow any invalid positions. Therefore, test what can be done, and you may design the report as you want it by trial and error.

In the picture below, the data is shown by *Average hours open*, *Caller category* and *Responsible*. Each responsible person is represented by a color, and when the mouse is drawn over a color the name of the responsible person is shown together with information on the other two variables.

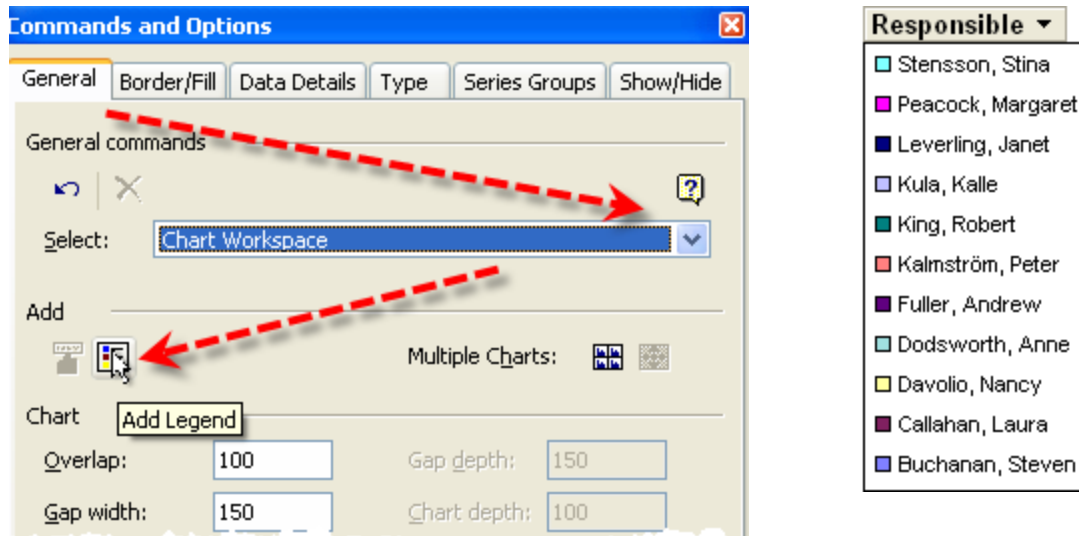


By **right clicking in the pivot or graph part** you get many options:

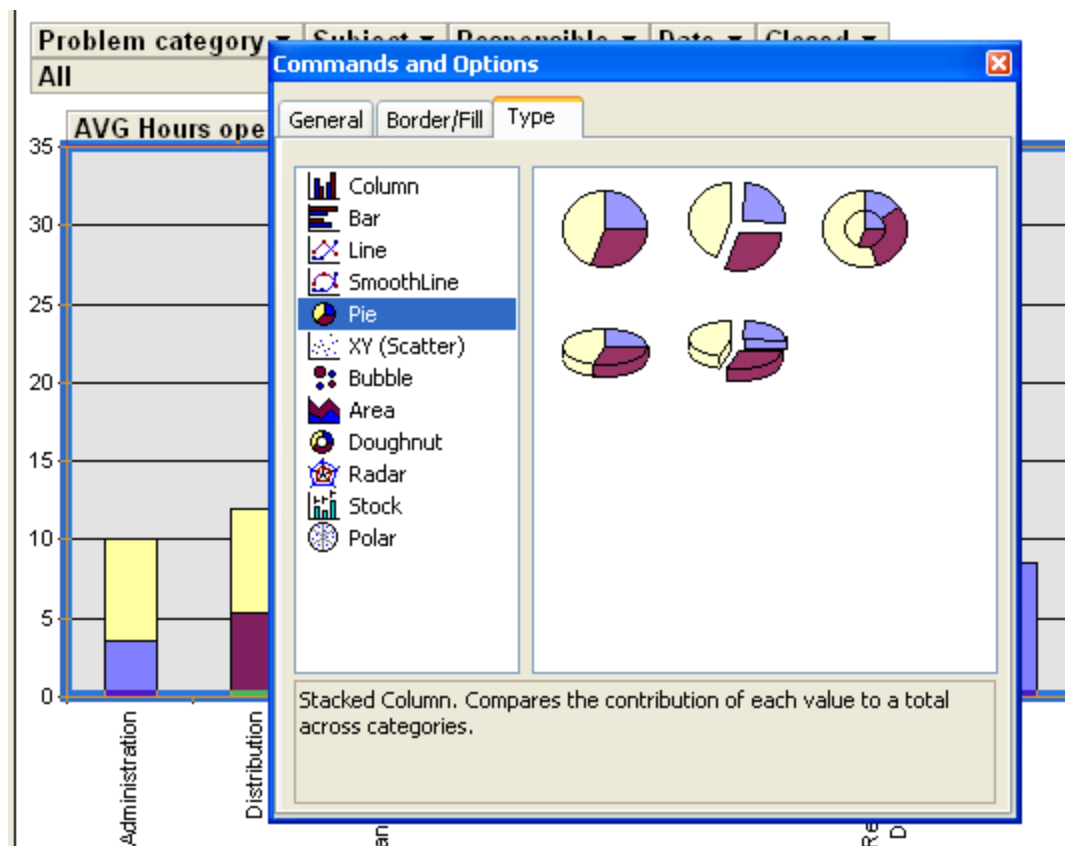
By choosing **Commands and Options** you can change how your graphs will look.



Select **General** and **Chart Workspace** to show a list of the color codes.



You can also choose how you want your **graphs** to look.

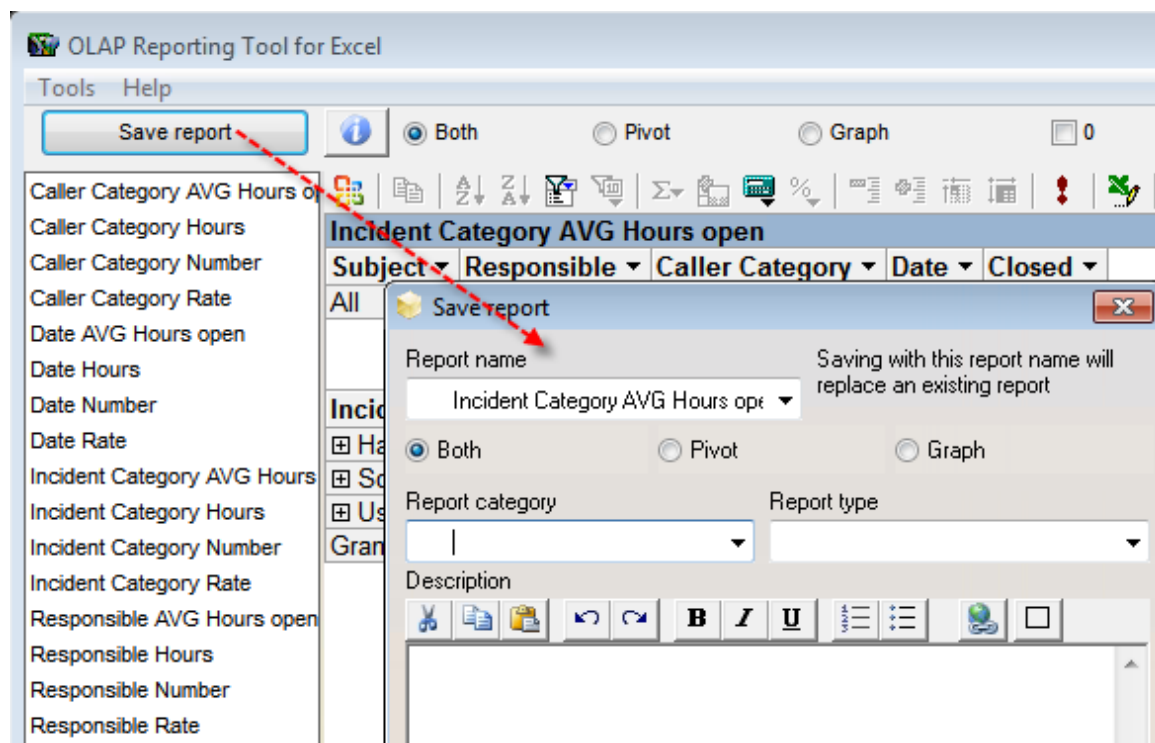


Also the **pivot** is possible to customize by right clicking and selecting **Commands and options**.



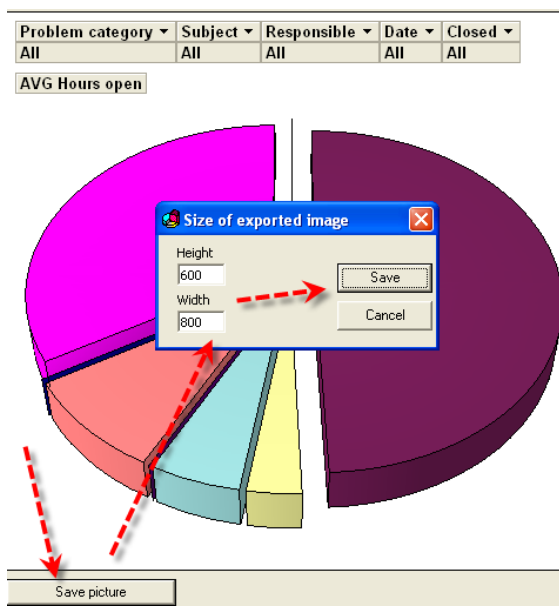
## 10.4 SAVE REPORT

When you have created a report with settings you wish to use more times, you can save it. The information about how you want your report is saved as a .txt file. Click **Save** report and give the report a **name**. Click OK, and your report will be shown in the **Reports list**.



## 10.5 6.5. SAVE GRAPH

Graphs can be saved as .gif files.





## 11 WEB FORM

**Public Folder HelpDesk - Web Form**

To report a problem, please fill out the following form and click Submit

Name

E-mail

Phone

Subject

Incident Type

Attachment ( maximum file size = 200 kb )  
 No file chosen

\*Description

Helpdesk web interface powered by:  
 **Public Folder HelpDesk**  
for Outlook®

With *PF HelpDesk* you can also set up an on-line web form, which creates tickets that go directly into your *PF HelpDesk* Outlook folder.

### 11.1 FILES

For the web form you use the folder **PFHDOOnline** in the *PF HelpDesk* directory. The folder contains a folder, **Uploads** and several **.asp files** with scripts that write **.xml-files** and uploaded files into the Uploads folder. You have to **allow server scripts** to be run at the web folder where you place the *PF HelpDesk* web form files. All files are open source and highly customizable, but of course you should always be careful and make a back up copy before you start changing anything. These files are presented in the section about Architecture, Files for the Web Form feature – PFHDOOnline folder.



## Public Folder HelpDesk - Web Form

Thank you for reporting this issue.  
It will now be transferred to our helpdesk staff, and you will soon hear from one of them.

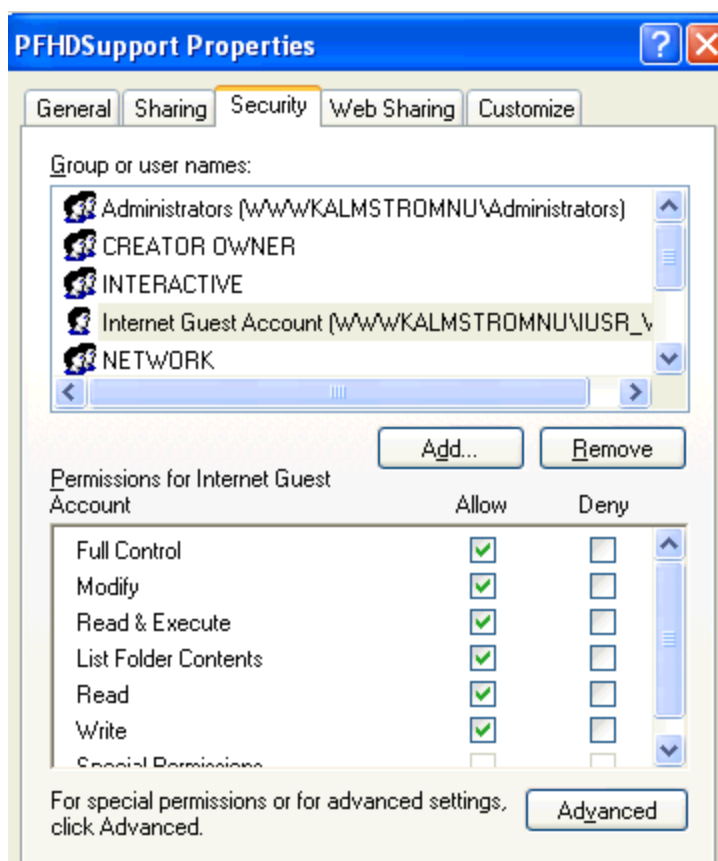
[Report another new issue](#)



### 11.2 SETTING UP THE WEB FORM

**Copy** all files from the PFHDOOnline folder and put them in a **directory on a web server**. You also need to set the **permissions** so that the .asp code can write .xml-files into this directory and into the Uploads directory.

Give the **Internet Guest Account** Full Control



### 11.3 SPECIFY PATH

In the *PF HelpDesk* Settings, the tab **Other settings** under Advanced, write or paste the **path** to the web form. Then *PF HelpDesk* will monitor your web form and from the .xml files create tickets inside your *PF HelpDesk* Outlook folder. Once you do this, a new file **PFHDCategories.xml** will appear in *PF HelpDesk* web directory (where your web files are stored). Refer to Monitoring.



#### 11.4 INCIDENT TYPES

The problem types in the web form are created from the **PF HelpDesk Settings**. When you define an URL where the web files are placed, the *PF HelpDesk* Settings tries to call an ASP page there. This web page creates an XML list with all problem types in the web server. When **default.asp** is opened and the XML file is there, the problem type will be shown in **default.asp**.

#### 11.5 MONITORING

The tickets from the web form can also be fetched **manually**, by pressing the button in the *PF HelpDesk* toolbar in Outlook. **IMAGE**

You can also **enable automatic tracking** of the web form and select from a list how often you want this to be done.

Path to HelpDesk Online Form (e.g. http://www.myDomain.com/helpdesk)

http://www.kalmstrom.com/PFHelpDesk/

☒ Enable Automatic Tracking 3 Minutes worked



#### 11.6 CREATED BY

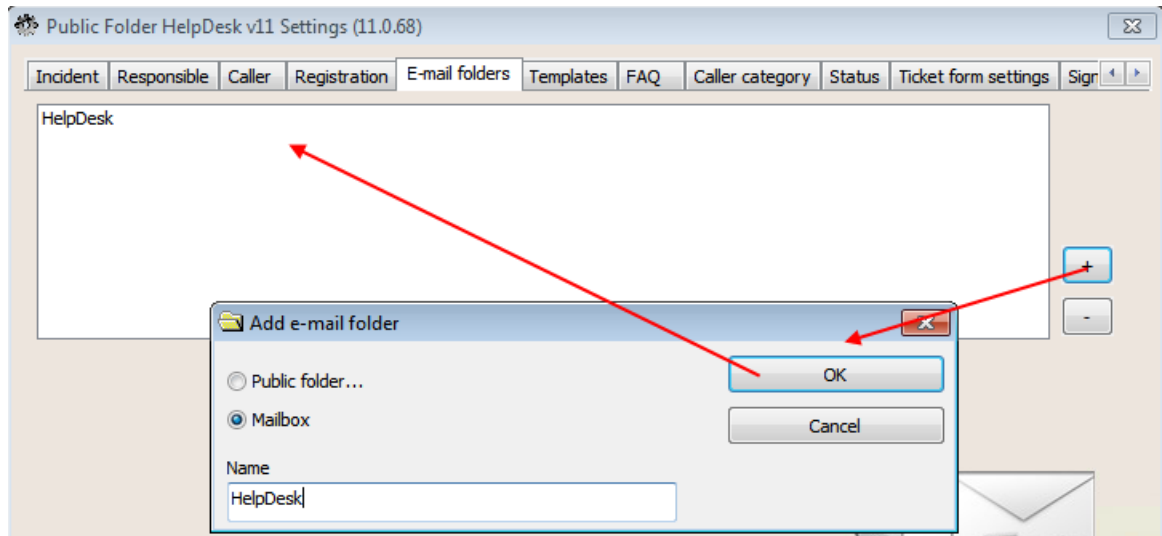
When an xml file is created on the web server and when someone after that goes into the *PF HelpDesk* folder in Outlook (this could be hours or even days after), the xml file is read and converted into a ticket. The "Created by" field is then automatically filled out with the person running *PF HelpDesk* at that time.

### 12 AUTOMATIC CONVERSION OF E-MAILS INTO TICKETS

By default incoming mail is placed in the Inbox and can be converted into tickets with a click on the *PF HelpDesk* Create Ticket icon in the Outlook toolbar, as described in E-mail, manual conversion.

Another way of working with *PF HelpDesk* is to automatically convert all mail to the helpdesk into tickets. To work this way you need to take two steps:

- Create a **separate e-mail address** for the helpdesk staff and a **separate folder** for incoming mail.
- **Add the folder** to *PF HelpDesk* under the tab **E-mail folder** in the Settings.



You can either monitor a public folder or a mailbox for automatic conversion to tickets. If you wish the folder to be a public folder, click OK and you are asked to select folder. For a mailbox the name of the folder must be written in. If you are using the mailbox, please make the necessary user access permission.

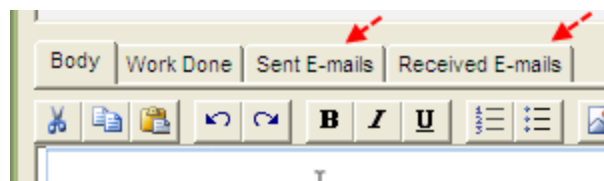
You must also decide **e-mail thread method** – in ticket body or in subfolders. *Refer to* E-mail history.

Procedure for a public folder:

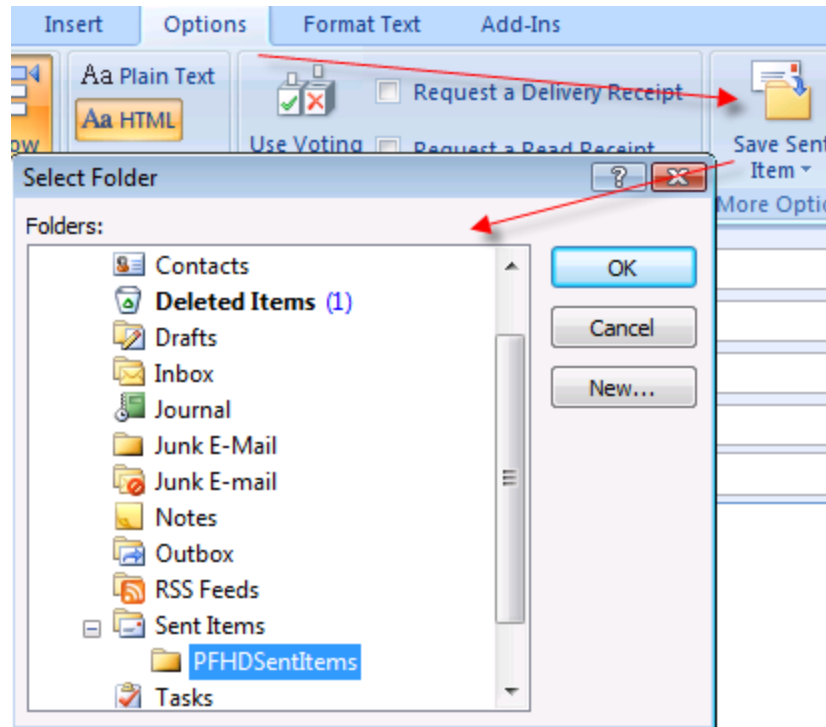
A.

Go into the *PF HelpDesk* Settings, check **Advanced** and choose the tab **Other settings**. Fill out the preferred **e-mail address** and click OK. When this is done the outgoing mail sent from tickets have the sender address you wish, and it is saved in a separate *PF Helpdesk* folder under Sent items. *Refer to* Send e-mail from.

If you have selected the alternative Save e-mail history in subfolders, you will also create **two new tabs** in the tickets with this setting: one for e-mails sent from the ticket and one for received e-mails that concern the same ticket number and have been converted into tickets.



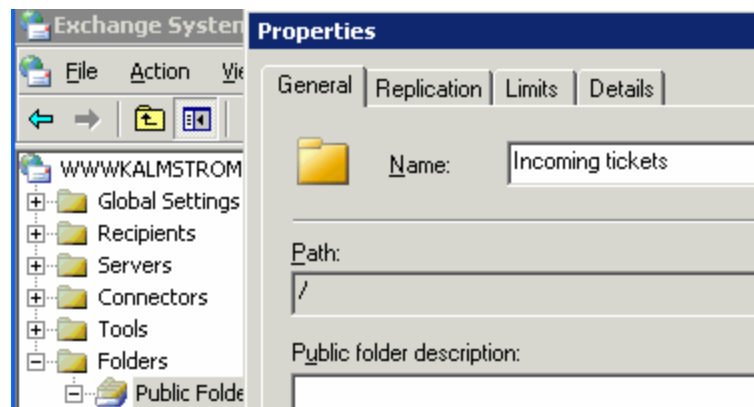
You can check your settings by clicking the e-mail symbol of a ticket, so that a new e-mail is created. In **Options** you can see that the e-mails are saved in the folder **PFHDSentItems**.



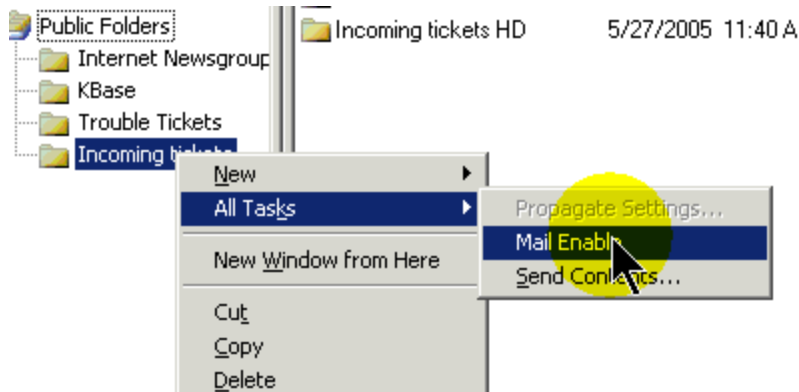
B.

The **e-mail address** for sent e-mails must be set up in the Exchange server too. Beware of that it may take some time, up to half an hour, for the server to propagate the changes. Here is what you must do on the server: (Exchange 2000 and 2003 is described below)

Create a **new Public folder** for incoming tickets

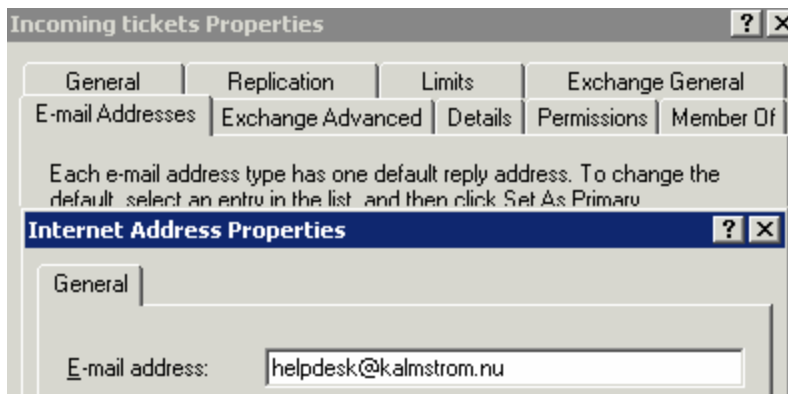


... and **Mail Enable** it by right clicking and choose **All Tasks** and then **Mail Enable**.

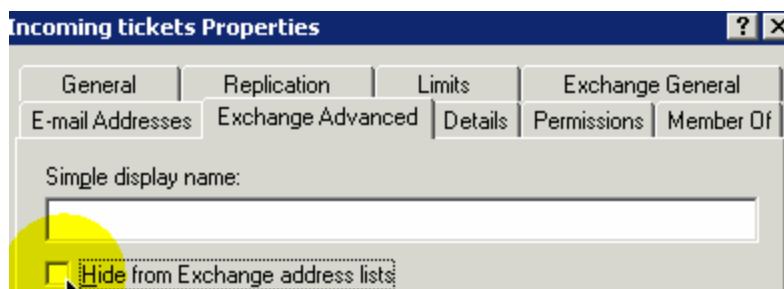


Right click the folder again and choose **Properties**. Under Properties you need to do three, four or five things:

1. Set the **SMTP e-mail address** under the tab **E-mail Addresses**.

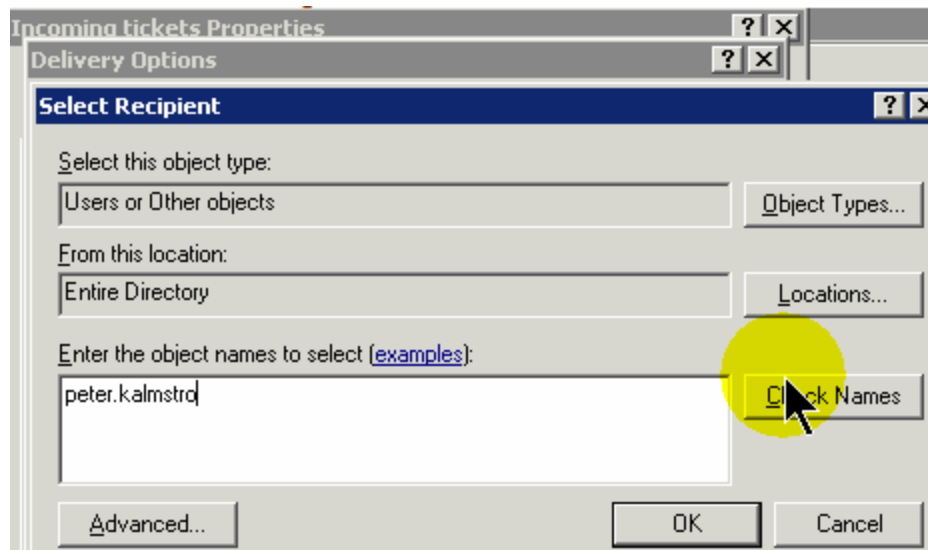


2. Under the tab **Exchange Advanced**, uncheck the checkbox "Hide from Exchange address list" which by default is set as hidden in Public folders.

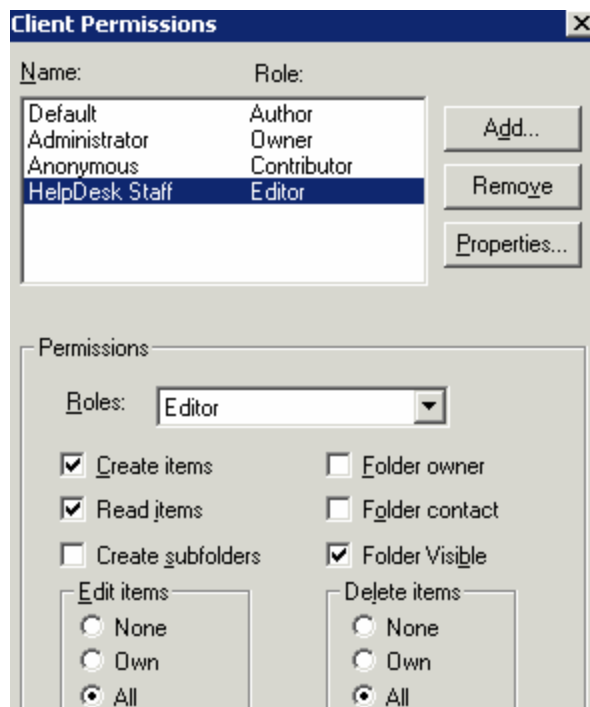


3. Under the **Exchange General** tab, choose the button **Delivery** options to grant permissions for the helpdesk staff to use the new folder:

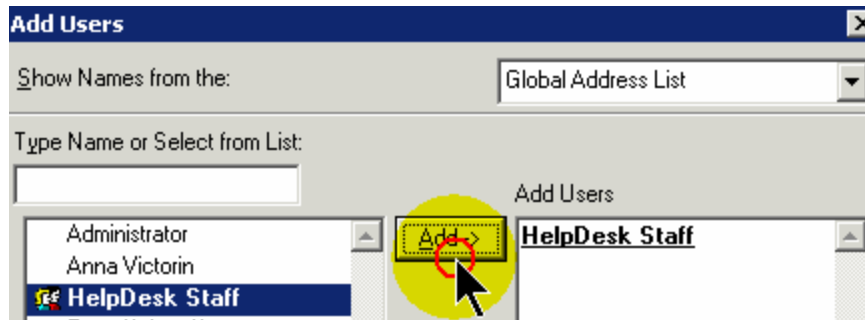
Click **Add**, and write the names of the people working at the helpdesk. The best way of doing this is to set up a **group** and manage permissions to the public folder by changing the group membership. The persons can also be entered one by one, and the names can be checked against the Global Address List.



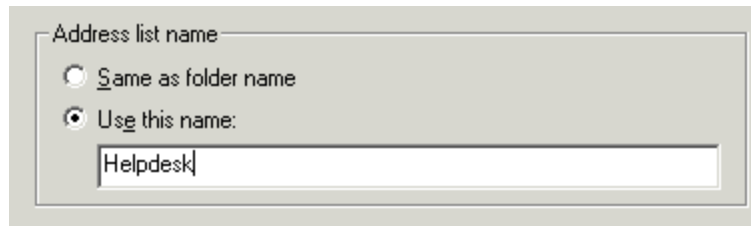
4. To be able to use the new folder all the users need to have at least **Editor** permissions for the public folders. Anonymous users must be **Contributors** to be able to send e-mail to the folder.



If this is not the case, you have to go into **Permissions** and change the **Client Permissions**. The easiest way of adding the helpdesk staff is to create a group in the Global Address List and add it.



5. To make it easier for the staff to use the e-mail address, you may want to give the folder a name for the address list. Do this under the tab **General**.



C.

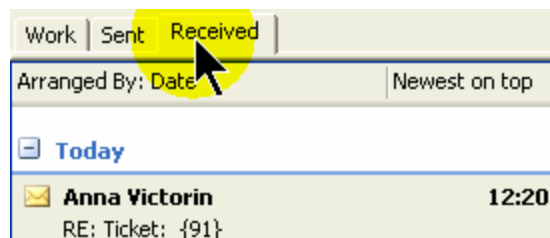
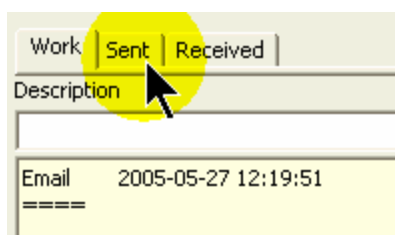
When the changes on the server are made, you need to go into the **Settings** of *PF HelpDesk* and set it to **monitor the new folder** and automatically pick up all incoming e-mails to that folder and convert them into tickets.

In the Settings, choose the tab **E-mail folders**. Click the plus sign and then click OK to select the new public folder.

Check your settings by sending an e-mail to a Caller from within a ticket and then another e-mail from the Caller to the helpdesk. Both e-mails should be shown in the ticket.

If you have selected to save E-mail history in the ticket body, *refer to* Save e-mails in ticket body, the two e-mails will be shown in the ticket body.

If you have selected to save E-mail history in subfolders, *refer to* Save e-mails in subfolders, there will be two tabs in the ticket showing the two e-mails:





## 13 ADVANCED

In this section of the manual I will point out some more advanced features of *PF HelpDesk*. There are many ways to customize and make the most out of the application; so many that I have no possibility of showing them all. For some customizations you need the developer license, but all changes described in this manual can be made with the **organizational version**. Please experiment for yourself! If you are used to working with Outlook and other Microsoft Office software, you will hopefully not have any big problems but instead find the task interesting and fun.

## 14 CUSTOMIZE FORMS

### 14.1 CUSTOMIZE THE TICKET HTML FORM

If you have some knowledge about HTML code, you can easily add new fields to the *PF HelpDesk* ticket form, so that it suits your company's needs. The new field will be available in every ticket, and the value you enter in it will be saved and available every time you open ticket.

Make data from your custom fields available in the database and in the statistics tool by selecting the new field under the tab "Ticket form Settings" in the *PF HelpDesk* Settings.

When modifying the HTML form, **never delete** a default tag or rename its id. When adding a new control or tag, their id should *not* be same as an existing tag or control id.

The Title of the ticket form must be {Ticket [Ticket ID]} + Subject.

These are the default *PF HelpDesk* ticket form IDs:

These IDs are used for labels

|                  |                |
|------------------|----------------|
| Subject          | lblSubject     |
| Ticket ID        | lblID          |
| Created at       | lblTime        |
| Caller name      | lblCaller      |
| Caller email     | lblName        |
| Caller phone     | lblEmail       |
| Caller category  | lblPhone       |
| atagCaller       | lblCategory    |
| Date due         | lblDue         |
| imgCal           | lblCreatedBy   |
| Created by       | lblStatus      |
| Ticket Status    | lblProblemtype |
| Problem Type     | lblResponsible |
| Responsible      |                |
| emailresponsible |                |

To customize the HTML ticket form, open the file PFHDTicketForm.htm in an HTML editor, like SharePoint Designer. You will find this file in the network installation folder. Add your organization logo, change colors and move available tags according to your requirement. You may add new fields where ever you want to place them, and you can also create a new table for your custom fields.

Three types of tags are supported for custom fields in the HTML form: Input type Text, Text Area and Select. When adding a tag in the HTML form it should be added inside the form tag.

Newly added tags must have unique IDs (other than the default IDs in the list above). The ID should not have any special characters. This ID will be mapped in the ticket and also to report into the database. The database name of your custom field in the table tblTickets will be "custom" + ID of the tag.

In *OLAP Reporting Tool* the name of your custom field will be the ID of the added HTML tag.

#### 14.1.1 Example

Let's assume that you want to add the Caller's company name in the *PF HelpDesk* ticket. In this example the new field is added just after the Caller Comment row.

The screenshot shows a web-based ticket form titled "{Ticket 1640} test". The form is divided into two main sections. The left section contains fields for "Subject" (test), "ID" (1640), "Time" (4/9/2010 5:12:00 PM), "Caller" information (Name: Petersen, Jytte; E-mail: petersen.jytte@kalmstrom.nu; Phone: 31 12 34 56; Category: Research and Development), and a "More info" link. The right section contains fields for "Due" (4/9/2010), "Created by" (Jayant), "Status" (Waiting), "\* Incident type" (Printer installation), "\* Responsible" (Callahan, Laura), and "Company Name" (kalmstrom). A red arrow points to the "Company Name" field.

You have to modify the HTML code and add a span and a text tag in the HTML. The code will look like this:

```
<tr>
<td colspan="2" align="right" style="height: 26px">
    <span id="lblCompany" class="PFHDCaptions">Company:</span>
</td>
<td style="width:230px; height:26px; padding-left:2px">
    <input type="text" id="companyname" tabindex="4" style="width:
228px" class="style5" name="T6" />
</td>
</tr>
```

If you are not used to working with HTML you may use this code and change the text marked in red after your needs.

To make data from a customized field available in the database and *OLAP Reporting Tool*, open the *PF HelpDesk Settings*, check "Advanced" to see all tabs and select the tab "Ticket form Settings".



PFHelpDesk V11 Configure (11.3.6)

Incident Responsible Caller Registration E-mail folders Templates FAQ Caller Category Status Ticket form settings Sign

**Custom Fields**  
Save the following checked custom fields (introduced in the PF HelpDesk ticket form) to the database

Custom fields list:  
☒ companyname

Apply

**Non-existent values in the ticket form**  
Should PF HelpDesk automatically save non-existent values for the following drop-down list in the ticket form?

|                 |                                      |                           |                          |
|-----------------|--------------------------------------|---------------------------|--------------------------|
| Incident Type   | <input checked="" type="radio"/> Ask | <input type="radio"/> Yes | <input type="radio"/> No |
| Responsible     | <input checked="" type="radio"/> Ask | <input type="radio"/> Yes | <input type="radio"/> No |
| Status          | <input checked="" type="radio"/> Ask | <input type="radio"/> Yes | <input type="radio"/> No |
| Caller Category | <input checked="" type="radio"/> Ask | <input type="radio"/> Yes | <input type="radio"/> No |

**Default value**  
☐ Assign default minutes to a closing ticket if Minutes worked field is empty Value

☐ Auto-add new caller

☐ Do not include attachments in e-mails to callers.



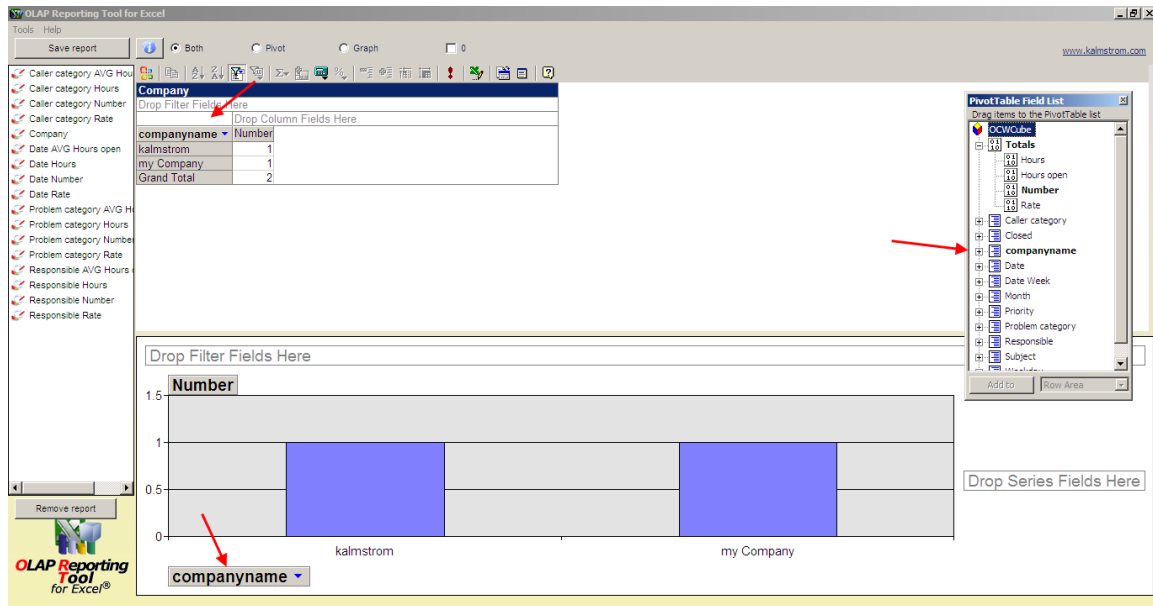
Public Folder HelpDesk for Outlook®  
**kalmstrom.com**  
Business Solutions

☒ Advanced

[www.kalmstrom.com](http://www.kalmstrom.com) OK Cancel

The newly created field with the ID "companyname" is now visible in the Custom Fields list. Select it and press "Apply". Now the database entry for this field will be created, and when this is done, every entry into this custom field in the ticket will be saved in the database.

The Company name data will also be available in *OLAP Reporting Tool*. As the ID of the added HTML tag is "companyname" the data will be shown under that title.



## 14.2 CUSTOMIZE THE WEB FORM

If you have some knowledge about HTML and ASP, you can easily add new fields to the *PF HelpDesk* web form, so that it suits your company's needs. If you add a new field in the ASP page, you must also add that field in the HTML Ticket Form with the same ID, refer to *Customize the Ticket HTML Form*.

Make data from your custom fields available in the database and in the statistics tool by selecting the new field under the tab "Ticket form Settings" in the *PF HelpDesk* Settings.

When modifying the HTML form or ASP page, **never delete** a default tag or rename its ID. When adding a new control or tag, their ID should *not* be same as an existing tag or control ID.

To add new field you have to modify **two** ASP pages "default.asp" and "addTicket.asp".

In "default.asp" you have to insert a new field in the submit form and modify the submitData function to send -the value of the new field to "addTicket.asp" for processing.

In "addTicket.asp" you have to define a new variable and add processing for the new field variable. The File "addTicket.asp" will write data into an XML file and save it.



### 14.2.1 Example

**Public Folder HelpDesk - Web Form**

To report a problem, please fill out the following form and click Submit

Name

E-mail

Phone

Subject

Company Name

Incident Type

Attachment ( maximum file size = 200 kb )  
 No file chosen

\*Description

Helpdesk web interface powered by:  
**Public Folder HelpDesk**  
for Outlook®

First of all if you want to add the field Company to the web form, you have to add the field to the default.asp, which is the page that the users see.

You can use the same code as in the HTML Form customization.

```
<tr>
<td align="left" width="127">
    <span id="lblCompany" class="PFHDCaptions">Company Name
</span>
</td>
<td style="width:230px; height:26px; padding-left:2px">
    <input type="text" id="companyname" tabindex="4" style="width:
228px" class="style5" name="T6" />
</td>
</tr>
```

Then find a submitData function and add the function for getting value from this field:

```
function submitData(frm)
{
....
}
```



```
var sAction = "addTicket.asp?";
sAction += "CallerName=" + escape(frm.txtName.value);
sAction += "&CallerEmail=" + escape(frm.txtEmail.value);
sAction += "&CallerPhone=" + escape(frm.txtPhone.value);
sAction += "&CallerSubject=" + escape(frm.txtSubject.value);
sAction += "&CallerDescription=" + escape(frm.Message.value);
sAction += "&companyname =" + escape(frm.companyname.value);
```

```
        sAction += "&ProblemType=" + selectedProblemType;
        sAction += "&Sel=" + w;
        sAction += "&defFileName=" + leafname;
    frm.action = sAction;
    frm.submit();
}
}
```

Modify "addTicket.asp" in the following way:

1. Add a new variable definition

```
Dim companyname
```

2. Add processing

```
companyname = Request.QueryString("companyname")
```

3. Add the code highlighted in red color below in "addTicket.asp". The XML element ID (companyname) should be the same as the ID of the corresponding custom field in the HTML Form.  
Always add a new XML element at the end.

With objXMLv

```
.appendChild(objXML.createElement("ID"))
.appendChild(objXML.createElement("CallerName"))
.appendChild(objXML.createElement("CallerEmail"))
.appendChild(objXML.createElement("CallerPhone"))
.appendChild(objXML.createElement("Subject"))
.appendChild(objXML.createElement("Body"))
.appendChild(objXML.createElement("DATE"))
.appendChild(objXML.createElement("Attachment"))
.appendChild(objXML.createElement("ProblemType"))
.appendChild(objXML.createElement("companyname"))

.childNodes(0).text = intID
.childNodes(1).text = CallerName
.childNodes(2).text = CallerEmail
.childNodes(3).text = CallerPhone
.childNodes(4).text = CallerSubject
.childNodes(5).text = replace(CallerDescription,vbCrLf,"<br>")
.childNodes(6).text = Now()
.childNodes(7).text = strFileName
.childNodes(8).text = ProblemType
```



`.childNodes(9).text = companyname`  
End With

## 15 KALMSTROM.COM COMMUNITY

To use *PF HelpDesk* you must be a member of kalmstrom.com Community and pay the monthly fees. There are three different membership levels, refer to <http://www.kalmstrom.com/Community/>. Support, free upgrades and an unlimited number of users within the organization are included in all three levels. The Developer License might also be bought outside the Community.

### 15.1 LICENSES

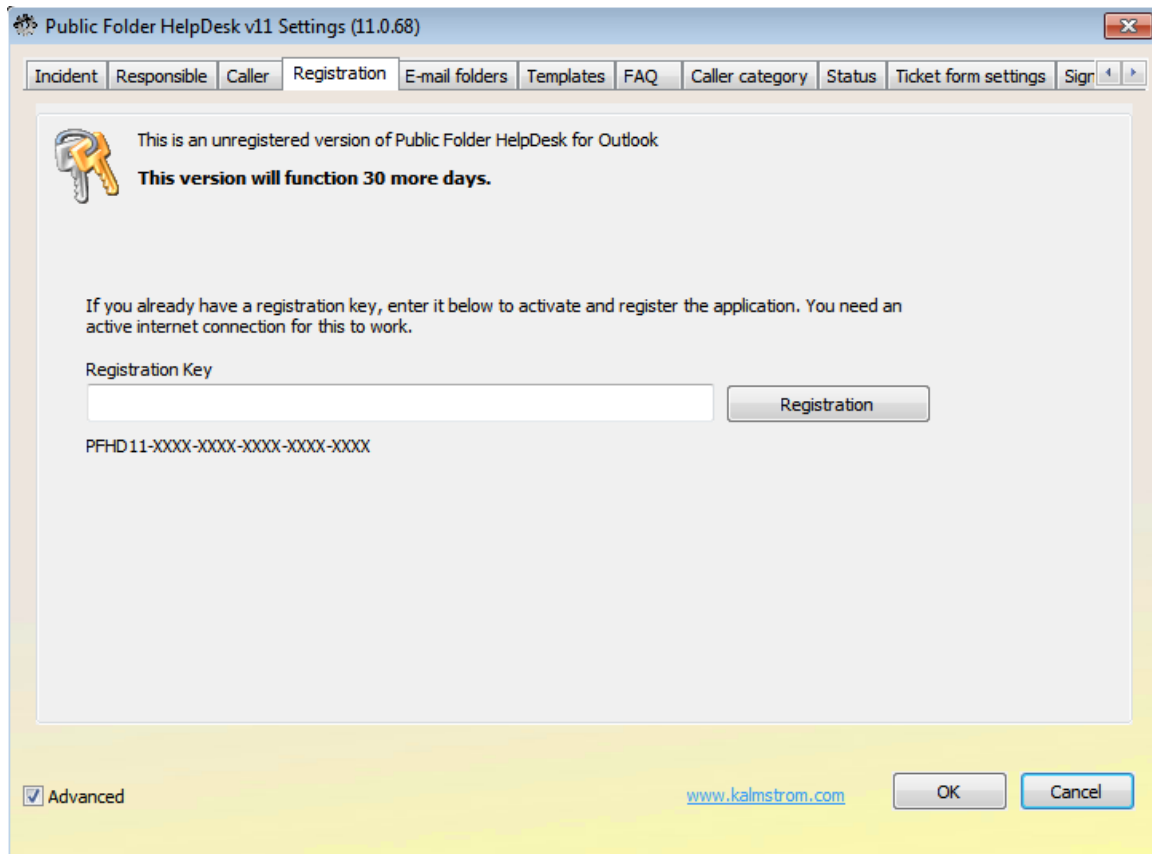
*Organizational License* – gives permission to run *PF HelpDesk* in any number of Outlook folders within one organization. The application may be used by any number of users.

*Developer License* – also includes all source code for *PF HelpDesk* + the sources for *OLAP Reporting Tool* and *KBase*. The developer license gives you the right to customize *PF HelpDesk* for use within your own company. You are not allowed to build new applications on our source or to distribute them outside your company.

## 16 REGISTER

The evaluation period for *PF HelpDesk* expires after 30 days. Then you need to register to be able to work with the software. Enter the registration key under the tab Registration in the *PF HelpDesk* Settings. *PF HelpDesk* needs access to internet to verify the key.

If the 30 day's trial period is over, the registration tab is automatically displayed. There is also a possibility of getting a new trial period, *refer to* Extended trial.



Note that the person who registers *PF HelpDesk* must have **owner's right over the *PF HelpDesk* folder in Outlook**. Once registration succeeds, registration is done for all user of *PF HelpDesk*.

*PF HelpDesk* is free for use for Members of kalmstrom.com Community, refer to [www.kalmstrom.com/Community/](http://www.kalmstrom.com/Community/)

*PF HelpDesk* will automatically create a license registration for *OLAP Reporting Tool* once *PF HelpDesk* is registered. Also *KBase* is registered automatically if the path to the *KBase* application is entered under the Other settings tab in the *PF HelpDesk* Settings before registering.

## 17 EXTENDED TRIAL

If you need a longer trial period than the 30 days, you can get another 30 days by removing the database. When you open *PF HelpDesk* again you are asked to select a new database, and you get a new 30 day's evaluation period. All your settings and tickets will be lost at this point, though.

## 18 REPAIR PF HELPDESK

The repair option is intended for repair of the same version as the one installed. Run the installation file you already have, (**PF HelpDeskSetup.exe**). Choose the alternative Upgrade/Repair in the installer and it will take care of it all.



## 19 REMOVE PF HELPDESK

*PF HelpDesk* does not appear among Program Files. That way you may have several installations on one machine, but it also means that you cannot remove the application through the Control Panel. To remove *PF HelpDesk*, delete all the *PF HelpDesk* folders and files. To continue using the Outlook folder without *PF HelpDesk*, go into properties and uncheck the "Show home page by default" checkbox.

Each user should also un-install the *PF HelpDesk* Client Tools. This is done from the Control Panel, Add-Remove programs / Programs and Features.

## 20 CONTACT

The solutions of kalmstrom.com are supposed to be very easy to deploy, use and manage. However, if you have any kind of problem or questions about our software, there are several ways of contacting us:

|             |                                                                  |                            |
|-------------|------------------------------------------------------------------|----------------------------|
| E-mail      | <a href="mailto:support@kalmstrom.com">support@kalmstrom.com</a> | Technical issues           |
|             | <a href="mailto:sales@kalmstrom.com">sales@kalmstrom.com</a>     | General and sales issues   |
| Telephone   | +46 739 206 106                                                  | Within USA: (800) 518-4155 |
| Chat online | <a href="http://www.kalmstrom.com">www.kalmstrom.com</a>         |                            |

## 21 ARCHITECTURE

*Public Folder HelpDesk* consists of several files. These are usually located in a folder on a network drive, where all users of *PF HelpDesk* can access and execute. The following descriptions of the *PF HelpDesk* files are provided to give you a general understanding of the functions carried out by each file.

### 21.1 FILES ON THE NETWORK DRIVE

***PFHelpdesk.exe*** – This is the heart of *PF Helpdesk* and is running in the background when *PF HelpDesk* is active in the public folder. When you step out of the *PF HelpDesk* public folder, it is

unloaded. This application houses all functions required for interacting with Outlook, forms and database. You can confirm if this application is currently running by:

- checking for '**PFHelpdesk.exe**' in the Task Manager
- seeing if the sidebar helpdesk toolbar in the PF HelpDesk public folder is there. In Outlook 2007 this functionality is controlled by the PF HelpDesk add-in, not by the background PFHelpdesk.exe, though.

**PFHelpdeskSettings.exe** – This is an administrator tool for defining *PF Helpdesk* intrinsic settings such as problem type, categories, responsible persons, caller list, ticket email templates, FAQ, signatures and other advance exchange and online web form settings.

**PFHelpDeskExampleData.exe** – This is an application for loading full-fledged demo examples to PF Helpdesk (usually after a fresh installation) for thorough testing and evaluation.

**PFHelpdeskClientTools.exe** – This is a client installer that must be run from every client system from where *PF HelpDesk* will be accessed. This installs three libraries:

- **PFHelpdeskClientTools.dll** (a PF Helpdesk Outlook add-in),
- **SafeKalmstrom.dll** (an Outlook redemption library used for accessing certain Outlook properties without trespassing its security structure.)
- **eSellerateControl365.dll** for registration

**PFHDCleanSubfolders.exe** – Run this file if you want to permanently remove closed tickets subfolders. When you do you will be asked to define created date(s) before or between which the subfolders will be removed.

**OLAPReporting.exe** – This is the integrated statistics application called *OLAP Reporting Tool* which is also available as a standalone product. This tool is extremely useful (for managers) to extract business critical information from the helpdesk database. For more information on how to use this product, visit <http://www.kalmstrom.com/products/Excel/OLAPReporting/>.

**PFHelpdesk.htm** – This is the HTML file used as a homepage for the helpdesk public folder. It contains scripts that interact with Outlook objects.

**HDTemplateEnglish.pst** – This is an Outlook data file (PST) used early in the installation of *PF HelpDesk* to the public folder. It is also a language dependent file.

**PFHDDB.sql** – This is pre-defined SQL file used during installation if the user has selected an SQL server database.

**PFHDTicketForm.htm** – This is default PFHD ticket HTML ticket form. By this you can change look and feel of ticket form, you can also add PFHD11 custom property in this form.

## 21.2 FILES FOR THE WEB FORM FEATURE – PFHDONLINE FOLDER

**default.asp** – The default page, see screen shot in the section about the Web form.

**addTicket.asp** – ASP script to process the user-entered data from the form. It creates/appends two XML documents - **masterTicket.xml**, which has listed all the available tickets since it was last read, and actual **ticket data XML files** (1.xml, 2.xml and so on).

**clsField.asp** – ASP class file for attachment feature and supplements the **clsUpload.asp file**.

**clsUpload.asp** – ASP class file for attachment feature.



**incProblemTypes.asp** – Shows the Incident Type dropdown combo inside the **default.asp** page.  
Reads from **PFHDCategories.xml** (which is created by **PFHDSaveCategories.asp**)

**PFHDSaveCategories.asp** – Writes the **PFHDCategories.xml** file and is called from the **PFHDSaveSettings.exe** when the settings are saved.

**removeMasterXML.asp** – This file is called by the **PFHelpDesk.exe** application each time the contents of the **masterTicket.xml** are read. It tries to remove all read ticket entries from the **masterTicket.xml** file as well as the attachments related to those read tickets.

**setMonitoringFlag.asp** – Monitors which *PF HelpDesk* user is currently monitoring the web form, to avoid conflicts.

**ThankYou.htm** – This page is displayed to confirm that a ticket has been posted.

### 21.3 CLIENT-INSTALLED FILES

**PFHelpdeskClientTools.dll** – This is an add-on to Outlook main explorer providing a toolbar button to manually convert an email to ticket. It also provides the task-pane buttons (Close, Add to Kb, Create Task) under Office 2007.

**SafeKalmstrom.dll** – an Outlook redemption library used for accessing certain Outlook properties without trespassing its built-in security structure.

**eSellerateControl365.dll** – used for registration.

Except for these client files, no other files need to be copied to the local machine. Files from the workgroup folder, which is usually a shared network folder, are executed directly from that location.